Dolphin Intelligent Software

User Manual

For Dolphin Version 2.4.1011.1

Dolphin Software Limited ©2004 – 2009

Chapter 1. Contents

Chapter 1. Contents 1-2

Chapter 2. What Is Dolphin? 2-1

Chapter 3. Dolphin Main Page 3-1

3.1. Menu Bar 3-2

3.1.1. Contents Menu 3-2

3.1.1.1. Data Centre 3-2

3.1.1.2. IMS Centre 3-3

3.1.1.3. Mail Centre 3-3

3.1.1.4. Process Centre 3-3

3.1.1.5. Report Centre 3-3

3.1.1.6. Schedule Centre 3-3

3.1.1.7. User Centre 3-3

3.1.1.8. Quit 3-3

3.1.1.9. Log On / Log Off 3-3

3.1.2. Edit Menu 3-4

3.1.2.1. Password 3-4

3.1.2.2. Preferences 3-4

3.1.2.3. DB Admin 3-4

3.1.2.4. Consultant Tools 3-4

3.1.3. View Menu 3-4

3.1.3.1. View EB 3-4

3.1.3.2. View Toolbars 3-5

3.1.3.3. Refresh 3-5

3.1.4. Help Menu 3-5

3.1.4.1. Reseller Details 3-5

3.1.4.2. Support Details 3-5

3.1.4.3. About Dolphin 3-5

3.2. Explorer Bar 3-6

3.2.1. Dolphin Document 3-6

3.2.2. Process Centre 3-6

3.2.3. Data Centre - Audits 3-6

3.2.4. Data Centre - Actions and Improvements 3-6

3.2.5. Mail Centre 3-7

3.2.6. Outlook Link 3-7

3.2.7. Report Centre 3-7

3.2.8. Schedule Centre 3-7

3.2.9. External Document 3-7

3.2.10. External Program 3-7

Chapter 4. Preferences 4-1

4.1. System Preferences 4-1

4.1.1. Link to Outlook 4-1

4.1.2. Auto Mail 4-1

4.1.3. Start Expanded 4-1

4.1.4. Only One Expanded 4-1
4.1.5. User Process 4-1
4.1.6. Show Overview Toolbars 4-1
4.1.7. Enable Notifiers 4-2
4.1.8. Auto Preview 4-2
4.1.9. Default Coordinator 4-2
4.1.10. TM Doc Group ID 4-2
4.1.11. Sort User Centre by: 4-2
4.2. Network ID 4-2
4.3. Link Explorer 4-3
4.3.1. To add a Group 4-3
4.3.2. To Link Items to a Group 4-4
4.4. Processes 4-7
4.5. Coordinators 4-8
4.6. Documents 4-8
4.7. Data Centre 4-9
4.8. Schedule Centre 4-10

Chapter 5. Data Centre 5-1
5.1. Introduction 5-1
5.1.1. Toolbar 5-1
5.1.1.1. Group 5-1
5.1.1.2. Preview 5-1
5.1.1.3. View Type 5-1
5.1.1.4. Add 5-2
5.1.1.5. View 5-2
5.1.1.6. Delete 5-3
5.1.1.7. Show All Fields 5-3
5.1.1.8. Print 5-3
5.1.1.9. Done 5-3
5.1.2. Menu Bar 5-3
5.1.2.1. Utilities Menu 5-3
Manage Training 5-3
Missing Required Modules 5-4
Passed Renewal Date 5-5
Updated Training Module 5-7
Assign RMs 5-8
Assign Trainers 5-8
Assign Risk Groups 5-9
Assign Training Groups 5-10
Assign User Breakdown 5-10
Assign Authorities / Responsibilities 5-10
Mass Training 5-11
Unlock All 5-12
Required Competency Count 5-12
Fill Process Tree 5-13
5.2. Explorer Bar 5-14

5.2.1. Records....5-14
5.2.1.1. Use of Toolbars in Records....5-15
Add Action....*5-15*
Add Improvement....*5-15*
Save....*5-15*
Print....*5-15*
Exit without Saving....*5-15*
Save and Exit....*5-15*
Attachment Tabs....*5-15*
5.2.1.2. Internal Audit....5-16
Main Tab....*5-16*
Audit Trail Tab....*5-17*
Audit Report....*5-17*
Actions/Improvements Tab....*5-18*
Attachments Tab....*5-19*
5.2.1.3. External Audit....5-19
Main Tab....*5-19*
Audit Trail....*5-20*
Results tab....*5-21*
Actions/Improvements tab....*5-21*
Attachments Tab....*5-22*
5.2.1.4. Actions and Improvements....5-22
Initial Tab....*5-23*
Authorization Tab....*5-26*
Actions Tab....*5-27*
Close Out Tab....*5-30*
Improvements Type Tab....*5-30*
5.2.1.5. Customers....5-30
Customer Tab....*5-31*
Notes Tab....*5-32*
Customer Care....*5-33*
Attachments....*5-33*
5.2.1.6. Customer Care....5-34
Feedback Tab....*5-34*
Customer Tab....*5-34*
Notes Tab....*5-35*
Actions Tab....*5-35*
Attachments Tab....*5-36*
Close Out....*5-37*
5.2.1.7. Suppliers....5-38
Supplier Tab....*5-38*
Notes Tab....*5-38*
Attachments Tab....*5-39*
5.2.1.8. Training Records....5-40
Training Requested Tab....*5-40*
Module Tab....*5-41*
Training Report Tab....*5-42*
Training Result Tab....*5-42*
Attachments Tab....*5-44*
5.2.1.9. Training Evaluation and Appraisal....5-45

Introduction 5-45
All Training Tab 5-45
Company Requirements Tab 5-46
Employee Interview Notes Tab 5-47
Training Arising from This Evaluation Tab 5-47
5.2.1.10. User Records (Admin Only) 5-50
Creating a New User 5-50
Contact Details 5-51
Appointment Details 5-52
Training Tab 5-54
Authority Tab 5-54
Attachments Tab 5-55
5.2.1.11. Meetings 5-57
Details Tab 5-57
Previous Meetings Tab 5-58
Any Other Business 5-59
Any Other Business Tab 5-60
Attachments 5-60
Sign Off Tab 5-61
Printing Minutes 5-62
5.2.1.12. Asset Register 5-63
Acquisition 5-63
Checks 5-64
Hire Out 5-65
Repairs 5-67
Disposal 5-68
5.2.1.13. Risk Assessment 5-68
Risks Checked 5-69
Risk Report 5-70
Actions taken to eliminate/minimize the risk 5-71
Attachments 5-72
5.2.2. Subrecords 5-73
5.2.2.1. Departments 5-75
5.2.2.2. Responsibility and Authority Area 5-75
5.2.2.3. Job Titles 5-76
5.2.2.4. Job Title Responsibility and Authority 5-77
5.2.2.5. User Responsibility and Authority 5-77
5.2.2.6. User Types 5-78
5.2.2.7. User Breakdown 5-78
5.2.2.8. Training Modules 5-79
Obsolete Training Modules 5-81
5.2.2.9. Training Groups 5-81
5.2.2.10. Training Group Links 5-81
5.2.2.11. Competency Levels 5-81
5.2.2.12. Trainers 5-82
5.2.2.13. Supplier Fault Types 5-83
5.2.2.14. Supplier Approval Codes 5-83
5.2.2.15. Customer Care Types 5-84
5.2.2.16. Action or Improvement Cause Codes 5-85
5.2.2.17. Required Modules by Job Title 5-85

5.2.2.18. Required modules by User 5-86
5.2.2.19. Required Competencies 5-87
5.2.2.20. Standards 5-87
5.2.2.21. Equipment Type 5-88
5.2.2.22. Type of Check 5-88
5.2.2.23. Test Frequency 5-89
5.2.2.24. Check Groups 5-90
5.2.2.25. Audit Trail Department Items 5-91
5.2.2.26. Audit Trail Process Items 5-91
5.2.2.27. Audit Trail Results 5-92
5.2.2.28. Meeting Types 5-92
5.2.2.29. Meeting Type Tabs 5-92
5.2.2.30. Risk Assessment Types 5-93
5.2.2.31. Risk Item 5-93
5.2.2.32. Risk Group 5-93
5.2.2.33. Risk Link 5-93
5.2.2.34. Risk Likelihood 5-94
5.2.2.35. Risk Severity 5-94
5.2.2.36. Risk Degree 5-95
5.2.2.37. Risk Identified 5-95
5.2.2.38. Process Tree 5-95

Chapter 6. Mail Centre 6-96
6.1. Introduction 6-96
6.2. File Menu 6-97
6.2.1. New Mail 6-97
6.2.2. Delete Mail 6-98
6.2.3. Print Mail 6-98
6.2.4. Close 6-98
6.3. View Menu 6-99
6.3.1. Group 6-99
6.3.2. View Type 6-99
6.3.3. Link to Outlook 6-99
6.4. Actions Menu 6-99
6.4.1. Forward Mail 6-99
6.4.2. Reply 6-99

Chapter 7. Process Centre 7-1
7.1. Introduction 7-1
7.2. Creating Process Diagrams 7-1
7.2.1. Create File from New 7-2
7.2.2. Copy Existing Map 7-3
7.2.2.1. An Alternative Copy Routine 7-4
7.2.3. Import Existing Map 7-4
7.2.4. Create a process map using the “Drill Down” Function 7-5

7.3. Editing Process Maps 7-6
7.3.1. Introduction 7-6
7.3.2. Resize the Node 7-7
7.3.3. Change the Node Formatting 7-7
7.3.4. Move the Node 7-7
7.3.5. Add a Link 7-7
7.3.6. Delete the Node 7-8
7.3.7. Short Cut 7-8
7.3.8. Add Node Interconnections 7-8
7.4. Node Properties 7-9
7.4.1. Styles Tab 7-9
7.4.1.1. Shape Style 7-9
7.4.1.2. Shape Orientation 7-9
7.4.1.3. Dash Style 7-9
7.4.1.4. Pen Width 7-10
7.4.1.5. Alignment 7-10
7.4.1.6. Auto Size 7-10
7.4.1.7. Picture Position 7-10
7.4.1.8. Shadow 7-10
7.4.1.9. Text Margins 7-10
7.4.1.10. Trimming 7-10
7.4.1.11. Gradient Mode 7-10
7.4.2. Colours 7-10
7.4.2.1. Fill Colour 7-11
7.4.2.2. Draw Colour 7-11
7.4.2.3. Text Colour 7-11
7.4.2.4. Shadow Colour 7-11
7.4.2.5. Gradient Colour 7-11
7.4.3. Flags 7-11
7.4.3.1. Hidden 7-12
7.4.3.2. Label Edit 7-12
7.4.3.3. Logical 7-12
7.4.3.4. Owner Draw 7-12
7.4.3.5. Selectable 7-12
7.4.3.6. Transparent 7-12
7.4.3.7. Gradient 7-12
7.4.3.8. X Moveable 7-12
7.4.3.9. Y Moveable 7-13
7.4.3.10. X Sizeable 7-13
7.4.3.11. Y Sizeable 7-13
7.4.3.12. In Linkable 7-13
7.4.3.13. Out Linkable 7-13
7.4.4. Text, Font and Images 7-13
7.4.4.1. Text 7-13
7.4.4.2. Font 7-13
7.4.4.3. Image Index 7-14
7.4.4.4. Tooltip 7-14
7.5. Link Properties 7-14
7.5.1. Styles 7-14

7.5.1.1. ArrowDst....7-14
7.5.1.2. ArrowOrg....7-14
7.5.1.3. ArrowMid....7-14
7.5.1.4. Line Style....7-15
7.5.1.5. Jump....7-15
7.5.1.6. Dash Style....7-15
7.5.1.7. Pen Width....7-15
7.5.1.8. End Cap....7-15
7.5.1.9. Start Cap....7-15
7.5.2. Text and Font....7-16
7.5.2.1. Text....7-16
7.5.2.2. Font....7-16
7.5.2.3. Tooltip....7-16
7.5.3. Colours....7-16
7.5.3.1. Draw Colour....7-17
7.5.3.2. Text Colour....7-17
7.5.4. Link Flags....7-17
7.5.4.1. AdjustOrg....7-17
7.5.4.2. AdjustDst....7-17
7.5.4.3. Hidden....7-17
7.5.4.4. Logical....7-17
7.5.4.5. Orthogonal Dynamic....7-17
7.5.4.6. Oriented Text....7-18
7.5.4.7. Owner Draw....7-18
7.5.4.8. Rigid....7-18
7.5.4.9. Rounded Corner....7-18
7.5.4.10. Selectable....7-18
7.5.4.11. Stretchable....7-18
7.6. Menu Bar....7-19
7.6.1. File Menu....7-19
7.6.1.1. New....7-19
7.6.1.2. Open....7-19
7.6.1.3. Close....7-19
7.6.1.4. Import....7-19
7.6.1.5. Save....7-19
7.6.1.6. Save As…....7-19
7.6.1.7. Page Setup....7-19
7.6.1.8. Print Preview....7-20
Print....7-20
Zoom....7-20
View Selector....7-21
Close....7-21
Page Selector....7-21
7.6.1.9. Home....7-21
7.6.1.10. Close....7-21
7.6.2. Edit Menu....7-21
7.6.2.1. Undo....7-21
7.6.2.2. Cut....7-21
7.6.2.3. Copy....7-21
7.6.2.4. Paste....7-21

7.6.2.5. Font 7-22
7.6.2.6. Change Edit Mode 7-22
7.6.2.7. Change Form Name 7-22
7.6.2.8. Reset Selectable 7-22
7.6.2.9. Set Default 7-22
7.6.3. View Menu 7-23
7.6.3.1. Properties 7-23
7.6.3.2. Revision History 7-24
7.6.3.3. Revision Documents 7-24
7.6.3.4. Zoom 7-25
7.6.3.5. Process Tree Properties 7-25
7.6.4. Format Menu 7-26
7.6.4.1. Align Left 7-26
7.6.4.2. Align Centre 7-26
7.6.4.3. Align Right 7-26
7.6.4.4. Align Top 7-26
7.6.4.5. Align Middle 7-26
7.6.4.6. Align Bottom 7-26
7.6.4.7. Space H 7-27
7.6.4.8. Space V 7-27
7.6.4.9. Size Width 7-27
7.6.4.10. Size Height 7-27
7.6.4.11. Nudge Left 7-27
7.6.4.12. Nudge Right 7-27
7.6.4.13. Nudge Up 7-27
7.6.4.14. Nudge Down 7-27
7.6.5. Help Menu 7-27
7.6.6. Process Tree Menu 7-27
7.7. Button Bars 7-29
7.7.1. New 7-29
7.7.2. Open 7-29
7.7.3. Save 7-29
7.7.4. Page Setup 7-29
7.7.5. Print Preview 7-29
7.7.6. Home 7-29
7.7.7.

Close 7-29
7.7.8. Undo 7-29
7.7.9. Cut 7-29
7.7.10. Copy 7-29
7.7.11. Paste 7-29
7.7.12. Change Font 7-29
7.7.13. Change Edit Mode 7-30
7.7.14. Change Form Name 7-30

7.7.15. Reset Selectable 7-31
7.7.16. Set Defaults 7-31
7.7.17. Back 7-31
7.7.18. Properties 7-31
7.7.19. Revision History 7-31
7.7.20. Old Process Map Revisions 7-31
7.7.21. Zoom 7-31
7.7.22. Process Tree Properties 7-31
7.7.23. Align Left 7-31
7.7.24. Align Centre 7-31
7.7.25. Align Right 7-31
7.7.26. Align Top 7-32
7.7.27. Align Middle 7-32
7.7.28. Align Bottom 7-32
7.7.29. Space Apart Horizontally 7-32
7.7.30. Space Apart Vertically 7-32
7.7.31. Size Width 7-32
7.7.32. Size Height 7-32
7.7.33. Nudge Left 7-32
7.7.34. Nudge Right 7-32
7.7.35. Nudge Up 7-32
7.7.36. Nudge Down 7-32
7.8. Keyboard Shortcuts 7-33
7.8.1. Help 7-33
7.8.2. Check Link 7-33
7.8.3. Change Font 7-33
7.8.4. Additional shortcuts 7-33
7.8.5. Add Link 7-33
7.8.6. Node Group Change 7-34
7.8.7. View Embedded Pictures 7-34
7.8.8. Select Mode 7-34
7.8.8.1. Draw Mode 7-34
7.8.8.2. Select Mode 7-35
Select an Area 7-35
Individual Selection 7-35
7.8.9. Add Node Tag 7-36
7.8.10. Del 7-36
7.8.11. Ctrl+C 7-36
7.8.12. Ctrl+V 7-36
7.8.13. Ctrl+Z 7-36

Chapter 8. IMS Centre 8-1
8.1. Introduction to the IMS Centre 8-1
8.1.1. IMS Centre Overview of Capabilities 8-1
8.1.1.1. Common Word Processing Features 8-1
8.1.1.2. Advanced Programming Capabilities 8-2
8.1.1.3. Localization (Additional Languages) 8-3
8.1.1.4. Supported File Formats 8-3
8.1.1.5. Supported Programming Languages 8-3
8.2. Explorer Bar 8-4
8.2.1. Using the Explorer Bar 8-4
8.2.1.1. Fully Expanded Explorer Bars 8-4
8.2.1.2. Only One Group Expanded in Explorer Bars 8-4
8.3. Button Bars 8-4
8.3.1. New IMS Document 8-4
8.3.2. Open IMS Document 8-4
8.3.3. Shortcuts 8-5
8.3.4. Save IMS Document 8-5
8.3.5. Find Item this document 8-6
8.3.6. Page Set Up 8-7
8.3.7. Print IMS Document 8-7
8.3.8. Print Preview 8-7
8.3.8.1. Print 8-8
8.3.8.2. Zoom 8-8
8.3.8.3. One Page 8-9
8.3.8.4. Two Pages 8-9
8.3.8.5. Three Pages 8-9
8.3.8.6. Four Pages 8-9
8.3.8.7. Six Pages 8-9
8.3.8.8. Close 8-9
8.3.8.9. Page Numbers 8-9
8.3.9. Go to Home Page 8-9
8.3.10. Close IMS Centre 8-9
8.3.11. Edit Document Links 8-10
8.3.11.1. Creating a New Group 8-10
8.3.11.2. Linking Documents 8-10
8.3.11.3. Close IMS Editor 8-11
8.3.11.4. Deleting Document Links 8-11
8.3.11.5. Deleting Groups 8-11
8.3.11.6. Changing Group Names 8-11
8.3.11.7. Changing Document Names 8-11
8.3.11.8. Changing Group Level ID 8-11
8.3.11.9. Changing Process Links 8-12
8.3.12. Root Process 8-12
8.3.13. Last Process 8-12
8.3.14. Linked Process 8-12
8.3.15. Revision History 8-12

8.3.16. Old Revision Attachments 8-12
8.3.17. Hyperlinks 8-13
8.3.17.1. Creating Targets 8-13
8.3.17.2. Editing Targets 8-14
8.3.17.3. Creating Hyperlinks 8-14
8.3.17.4. Editing Hyperlinks 8-15
8.3.18. Tables 8-15
8.3.18.1. Creating Tables 8-15
8.3.18.2. Editing Tables 8-15
8.3.19. Images 8-16
8.3.19.1. Adding Images 8-16
8.3.19.2. Editing Images 8-17
8.3.19.3. Deleting Images 8-18
8.4. Menus 8-18
8.4.1. File - Export 8-19
8.4.1.1. Cascading Style Sheets (CSS) format 8-19
8.4.1.2. Portable Document Format (PDF) format. 8-19
8.4.2. File - Page Setup 8-19
8.4.3. File - Home 8-19
8.4.4. Edit - Hyperlink 8-19
8.4.5. Edit - Targets 8-20
8.5. Document Panel 8-20
8.5.1. Formatting Button Bar 8-20
8.5.2. Document Ruler Bar 8-21
8.5.2.1. Insert Tabs 8-21
8.5.2.2. Delete Tabs 8-21
8.5.3. Document 8-21
8.5.4. Status Bar 8-21

Chapter 9. Report Centre 9-1
9.1. Introduction 9-1
9.2. Report Viewer Button Bar 9-2
9.2.1. Home 9-2
9.2.2. Close 9-2
9.2.3. Report Viewer Buttons 9-3
9.2.3.1. First 9-3
9.2.3.2. Previous 9-3
9.2.3.3. Next 9-3
9.2.3.4. Last 9-3
9.2.3.5. Go To Page 9-3
9.2.3.6. Close Current View 9-3
9.2.3.7. Print Report 9-3
9.2.3.8. Refresh 9-3
9.2.3.9. Export Report 9-4
9.2.3.10. Toggle Group Tree 9-4
9.2.3.11. Zoom 9-5
Customize… 9-5

9.3. Available Reports 9-6
9.3.1. Audit Reports 9-6
9.3.1.1. Audit List 9-6
9.3.1.2. Audit Detail 9-7
9.3.2. Improvement Reports 9-8
9.3.2.1. Improvement List 9-8
9.3.2.2. Improvement Detail 9-8
9.3.2.3. Improvements Overdue 9-9
9.3.3. Customer Reports 9-11
9.3.3.1. Customer List 9-11
9.3.3.2. Customer Detail 9-11
9.3.3.3. Customer Care List 9-12
9.3.3.4. Customer Care Detail 9-13
9.3.4. Supplier Reports 9-13
9.3.4.1. Supplier List 9-13
9.3.4.2. Supplier Detail 9-13
9.3.5. Mail Reports 9-14
9.3.5.1. Inbox Detail 9-14
9.3.6. Department Reports 9-15
9.3.6.1. Department List 9-15
9.3.6.2. Department Detail 9-16
9.3.7. User Reports 9-16
9.3.7.1. User Detail - Current 9-16
9.3.7.2. User Detail - All (Admin Only) 9-17
9.3.7.3. User List (Admin Only) 9-18
9.3.8. External Reports 9-19
9.3.8.1. View External Report 9-19
9.3.9. Training Reports 9-19
9.3.9.1. Skill List 9-19
9.3.9.2. Training by Skill 9-20
9.3.9.3. Training by Trainee 9-20
9.3.9.4. Training by Trainer 9-21
9.3.9.5. Training Matrix 9-22
9.3.9.6. Required Modules 9-22
Missing by Module 9-23
9.3.9.7. Updated Modules 9-23
9.3.9.8. Renewal Overdue 9-24
9.3.10. Meeting Reports 9-24
9.3.10.1. Meeting Report 9-24
9.3.11. Schedule Reports 9-25
9.3.12. Equipment Reports 9-25
9.3.13. Risk Reports 9-25
9.3.13.1. Risk List 9-25
9.3.13.2. Risk Assessment Detail 9-25
9.3.14. Responsibilities/Authorities 9-26
9.3.14.1. Responsibilities / Authorities Matrix by Job Title 9-26
9.3.14.2. Responsibilities / Authorities Matrix by User 9-26

Chapter 10. Schedule Centre 10-1
10.1. Introduction 10-1

To Do List *10-1*
10.2. User Accounts **10-2**
10.3. User Type **10-2**
10.4. Timeline **10-4**
10.5. Generating a New Appointment **10-4**

Chapter 11. Dolphin Loader.Exe 11-1

Chapter 12. Miscellaneous 12-2
12.1. Creating Sorts on Groups **12-2**

Chapter 13. Appendixes 13-1
13.1. Appendix A - Installation **13-1**
13.1.1. Windows 98 13-1
13.1.2. Windows ME 13-1
13.1.3. Windows 2000 13-1
13.1.4. Windows NT4 13-1
13.1.5. Windows XP Home 13-1
13.1.6. Windows XP Pro 13-1
13.1.7. Upgrade to XP Pro 13-1
13.1.8. Dolphin Network Assistant 13-1
13.2. Appendix B - Post Installation **13-2**
13.2.1. Introduction 13-2
13.2.2. Stand-Alone System 13-2
13.2.3. Network System 13-2
13.2.4. Activating the Software 13-3
13.2.5. Installing Event Checker onto Dolphin 13-3
13.2.6. Multiple Dongle Addresses 13-5
13.3. Appendix C - Index **13-1**

Chapter 2. What Is Dolphin?

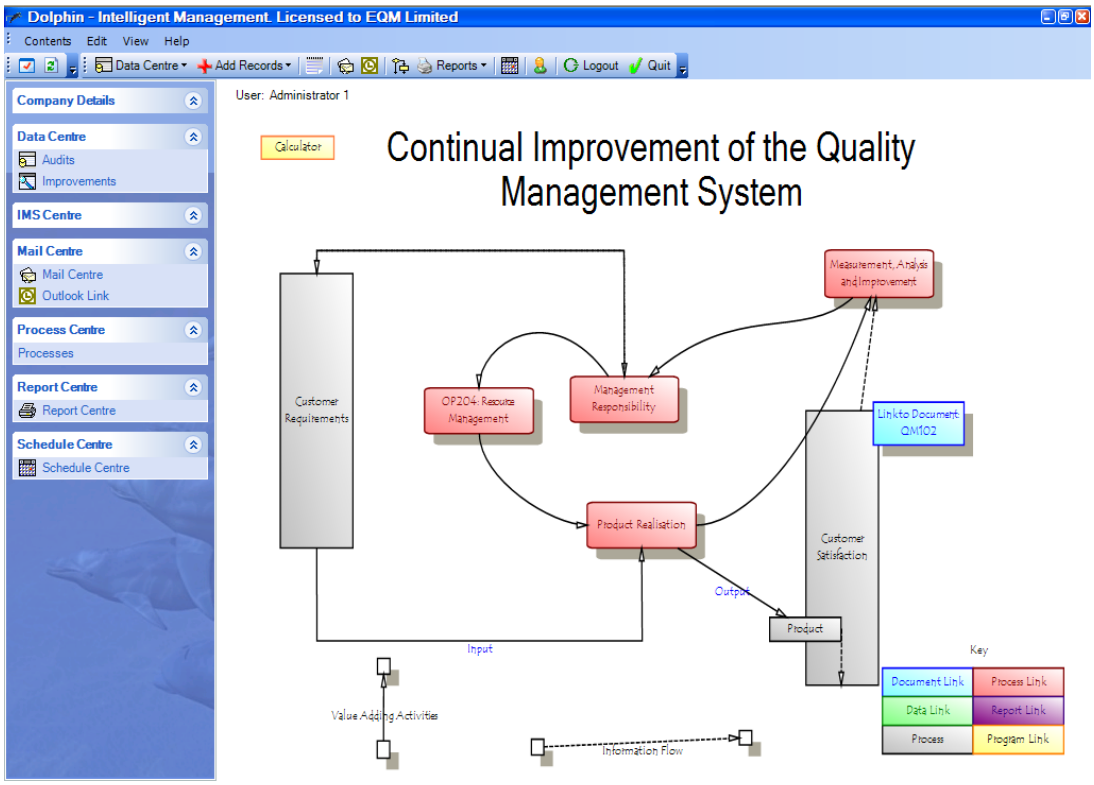
Paperless Management Systems are the talk of the moment. Everyone is fed up with the amount of paper that the average management system (Quality, Environmental, Occupational Health and Safety or Information Security Management) generates. There seems to be no end to the reports, the forms, the documented procedures and even the flow charts. It is a major evolution just keeping track of the bits of paper.

Not any more. The developers of Dolphin Software have been developing paperless quality systems since 1995. Many different software programmes were tried and some had limited success. Many of them only succeeded due to the ingenuity of the consultant. Although all of our paperless systems achieved accreditation to the relevant standard that they were designed to comply with, at Dolphin Software Ltd we consider compliance to be the minimum standard, not the whole objective. When these early paperless systems moved beyond merely complying with the standard, it became apparent that the software could not support the greater functionality required for a truly paperless system.

As Lead Auditors of some years standing, DSL Consultants knew exactly what they wanted the software to do. However, after checking dozens of so called "Process Mapping" programmes they came to the conclusion that they were going to have to design and commission the software themselves. This means that the difference between Dolphin Software and all others that we have checked is that the development of Dolphin is driven by consultants, not by software engineers. All other software starts out as the brainchild of a software company then, when the software is at the beta testing stage, they develop a network of consultants to distribute and use the software. At DSL the difference in approach may seem cosmetic, but is in fact a world apart. The software has been developed to provide the functionality that the consultants need in order to help their clients achieve the objectives of business effectiveness and continual improvement. Dolphin is the only software tool that will enable a full management system to achieve the status of Corporate Social Responsibility through pre-defined targets and controlled and measurable progress towards those goals.

The software then is a tool to enable the development of paperless management systems. However, it is only a tool. Many companies who produce "Process Mapping" software forget to tell you that once you have the software, you still need to develop the process maps, control the documents and control the records. With Dolphin Intelligent Software, this is made incredibly easy as the records are built in, the document control is a feature of the software and the process mapping software is infinitely variable. Bear in mind, Dolphin has been developed by consultants because they wanted to provide paperless management systems to their clients.

Chapter 3. Dolphin Main Page



This is the heart of Dolphin, commonly referred to as the “Main Page”. It is possible to access all of the functionality of Dolphin from here, if you have the correct access rights.

All areas of this screen are infinitely customizable, to suit all customer needs. The Explorer Bar on the left can be taken off the screen or a link can be placed to internal or external areas of the program. The main panel is actually a Process Map created using the Dolphin Process Mapping programme so functionality such as buttons, videos, audio, images, etc can easily be added to the Main Page. It can also include company logos or specific processes and this area also can provide links to any area.

The toolbars can also be removed so the process area fills the screen on start-up.

This is the screen that Users will have automatically loaded as the default “Company Page” if they do not have a “User Process” assigned to them in System Preferences.

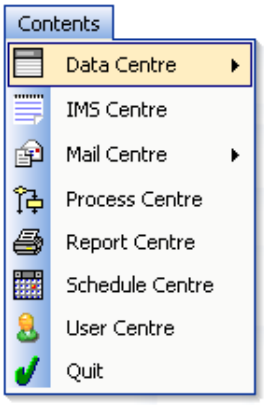
Using the toolbars, the Explorer Bar and any functionality on the Main Page, you can access all the applications and documents within your company from this screen.

3.1. Menu Bar

There are many options in the Menu Bar, all of which are explained below:

3.1.1. Contents Menu

The Contents Menu toolbar is shown below:



The Contents Menu and Toolbar will allow the user to view directly or add to:

- Internal Audits
- External Audits
- Action / Improvements
- Customers
- Customer Care
- Suppliers
- Training
- Evaluations
- Meetings
- Users
- Equipment Checks

The Contents Menu and Toolbar also allows the user to view specific reports directly from the Overview screen, these include:

- Internal Audit List
- Action / Improvement List
- Customer List
- Supplier List
- Department List
- Training Module List
- Training Record List
- Meeting Report
- Users
- Equipment Checks

Additionally, the Contents Menu allows the User to select a specific process to view.

3.1.1.1. Data Centre

The Data Centre is the heart and soul of all the data storage within Dolphin. It stores data relating to Subrecords and Records.

3.1.1.2. IMS Centre

This takes the User into the Integrated Management System (IMS Centre), the area where all internal Dolphin documents are stored and controlled.

3.1.1.3. Mail Centre

This Option is separated into 2 areas, "Mail Centre" - which takes the User to the Mail Centre (the dolphin internal mail section) and "Link to Outlook" (the external mail link).

3.1.1.4. Process Centre

This option takes the User to the "Process Centre" - the dolphin process mapping section.

3.1.1.5. Report Centre

This takes the User into the User into the "Reports Centre" where a multitude of reports can be produced and printed or exported.

3.1.1.6. Schedule Centre

This takes the User into the "Schedule Centre" where all schedules for the company can be arranged and printed.

3.1.1.7. User Centre

This takes the User into the "User Centre" where Users can be added, amended or deleted and access rights can be tailored to suit a User's needs. Additionally, part of the individual's training setup is contained within the User centre. Only Administrators have unlimited access to all areas of all records in the User Centre. Managers have limited access to the records of personnel in their own department and everyone has limited access to their own data.

3.1.1.8. Quit

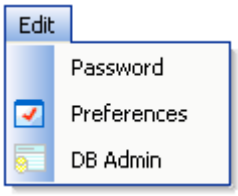
This option closes Dolphin.

3.1.1.9. Log On / Log Off

This option enables a User to log in and out of Dolphin quickly and easily and frees up the Dongle License until the User needs to log in. There is a minimize button to allow it to drop from view on the desktop and to place it on the toolbar.

3.1.2. Edit Menu

3.1.2.1. Password



This allows a User to change his/her password, the User must first enter the old password and then double enter the new password to prevent spelling mistakes. If the old password is not known then an administrator or management rep can find that User's password from the User Centre to inform the User so it can be changed.

3.1.2.2. Preferences

This takes the User to the Preferences dialog

3.1.2.3. DB Admin

This section is for use by Dolphin Software Limited only. This allows access to the Dolphin Database.

3.1.2.4. Consultant Tools

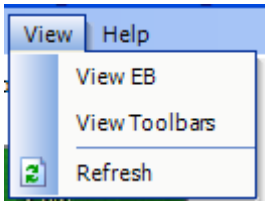
This section is password protected and available for Consultant Use only. If you require assistance select the "Help" button on the Home Page and then "Reseller Details".

The Process tab allows the extrapolation of data. . This option clears down the revision history and sets 1 record for each FLW file in the flowcharts folder. The revision numbers are set to 1 and the revision text reads 'first draft' the process description is made the same as the process filename (less the PR prefix). Similarly it is possible to extrapolate documents via the documents tab.

A "Document Extrapolation" option has been added to the Documents tab in Consultant tools. When selected this performs the following routines:

1. Clear DocHistory Table (Document Revision History)
2. Clear DocGroup Table (IMS Centre Document Groups)
3. Clear QMSIndex Table (IMS Centre Document Explorer Bar)
4. Clear Skills Table (Data Centre Training Modules)
5. Add Extrapolated and Training Modules Groups
6. Add Each Document to the Revision History
7. Add Each Document to The Explorer Bar
8. Add Each Training Module to the Training Modules

3.1.3. View Menu



3.1.3.1. View EB

This button shows/hides the customizable Explorer Bar.

3.1.3.2. View Toolbars

This button shows/hides the toolbars, and the default value can be set from the Preferences.

3.1.3.3. Refresh

This allows the user when changing PR Overview not to have to reboot dolphin to refresh the front screen.

3.1.4. Help Menu

3.1.4.1. Reseller Details

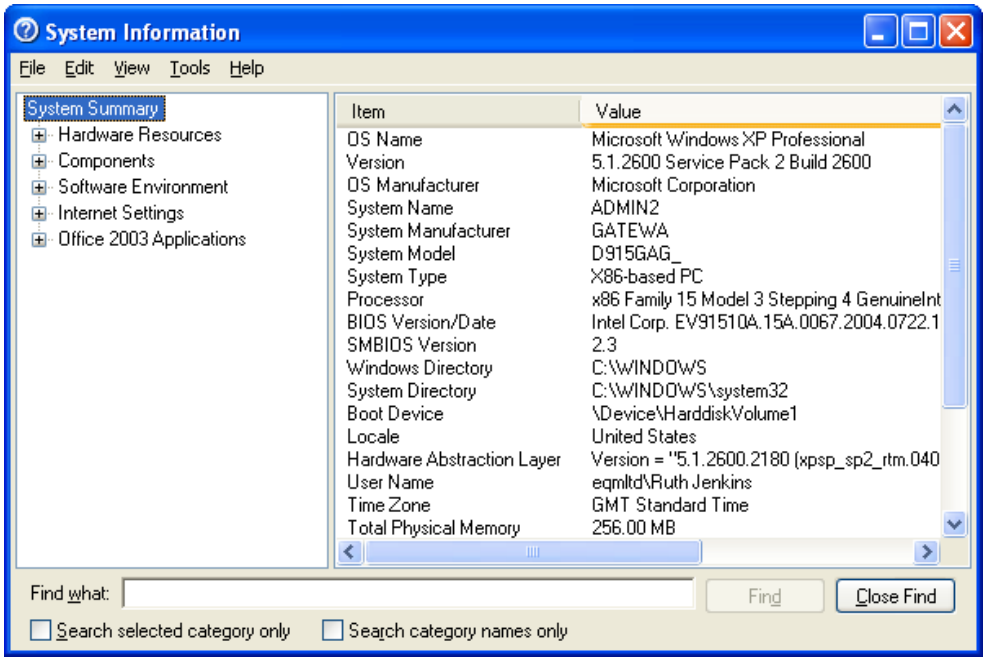
This takes the User to the Reseller Details screen, with all the contact information for your authorized Dolphin dealer.

3.1.4.2. Support Details

This takes the User to the Support Details screen, where all the contact information is contained for Dolphin Support.

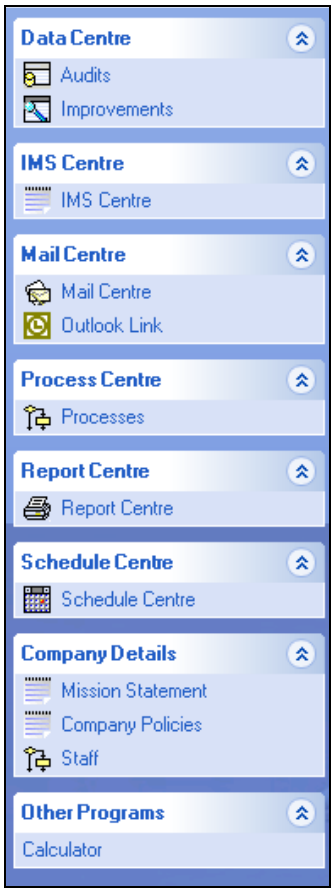
3.1.4.3. About Dolphin

Selecting this button takes the User to the System information screen; Dolphin Support may require details from this screen when handling a support call. The table below provides an example of the information held.



3.2. Explorer Bar

The Explorer Bar is fully customizable to provide Quick Links to any files or programmes associated with the information contained within dolphin. These links can be tailored using the Link Explorer to give a link to anywhere inside or outside the program. The options available on this menu are as follows. All Buttons can be programmed with any text desired.



3.2.1. Dolphin Document

An Administrator can add a button which takes the User to the any dolphin document within the IMS Centre

3.2.2. Process Centre

An Administrator can add a button which takes the User to any process map within the Process Centre

3.2.3. Data Centre - Audits

An Administrator can add a button which takes the User to the Internal Audit section of the Data Centre

3.2.4. Data Centre - Actions and Improvements

An Administrator can add a button which takes the User to the Actions/Improvements section of the Data Centre

3.2.5. Mail Centre

An Administrator can add a button which takes the User to the internal Mail Centre where Users can communicate or leave messages on the server.

3.2.6. Outlook Link

This section asks the User to log in to his/her Outlook email account. The User can then send/receive emails from within Dolphin.

3.2.7. Report Centre

An Administrator can add a button which takes the User into the User into the Reports Centre, where a multitude of reports can be produced and printed or exported.

3.2.8. Schedule Centre

An Administrator can add a button which takes the User into the Schedule Centre where all schedules for the company can be arranged and printed.

3.2.9. External Document

Through the Link Explorer in the Preferences section, an Administrator can add a button that launches any External Document stored on the company server, or if Dolphin is used locally any document stored on the User's computer. This includes, but is not limited to:

- Microsoft Word Documents
- Microsoft Access Databases
- Portable Document Format (PDF) Documents
- Lotus Documents
- Microsoft AutoRoute Directions
- Rich Text File (RTF) documents

3.2.10. External Program

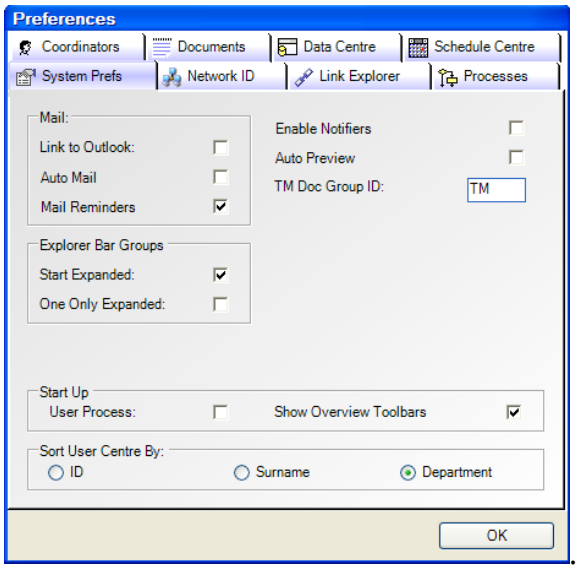
Through the Link Explorer in the Preferences section, an Administrator can add a button that launches External Program on the computer.

Chapter 4. Preferences

The Preferences section is split up into 5 tabs:

4.1. System Preferences

This Tab contains the mailing preferences and the Quick Link destinations



4.1.1. Link to Outlook

When ticked, this enables Dolphin to Email all Users with an email address stored in the User Centre automatically, whenever a Document or Process is altered.

4.1.2. Auto Mail

When ticked, this sends a message, using the internal Mail Centre automatically, whenever a Document or Process is altered.

4.1.3. Start Expanded

When ticked this causes all explorer bars within Dolphin to start up with all the groups expanded, (i.e. showing all the items contained within those groups).

4.1.4. Only One Expanded

When ticked, only one explorer bar group is allowed to be expanded at once. If a second group is expanded then the first one is closed.

4.1.5. User Process

When ticked, the User will be taken to a process map within the Process Centre when he/she enters Dolphin. The process map can be defined within the User Centre and can be unique for each User. The individual process is selected when setting up the User initially. It can be changed at any time but if left blank, the default page will be the starting point for that User.

4.1.6. Show Overview Toolbars

When ticked the Toolbars in the overview screen are visible when the User starts up Dolphin.

4.1.7. Enable Notifiers

When ticked, Dolphin informs the User of the completion of certain actions with a dialogue box on the screen. When un-ticked, completion of these same actions will be indicated by a beep.

4.1.8. Auto Preview

When ticked Dolphin displays preview bars automatically in data grids.

4.1.9. Default Coordinator

When all Coordinators on the Coordinators Tab show the same name that name will appear here. If this is greyed out, it is because at least two Coordinators are used in the Coordinators Tab. Any user may be set as the Default Coordinator.

Under the Coordinators tab there is the Site Administrator function. When ticked, this allows this person to enter Windows Login data in the user database & administer the Dolphin Event Checker (DEC).

4.1.10. TM Doc Group ID

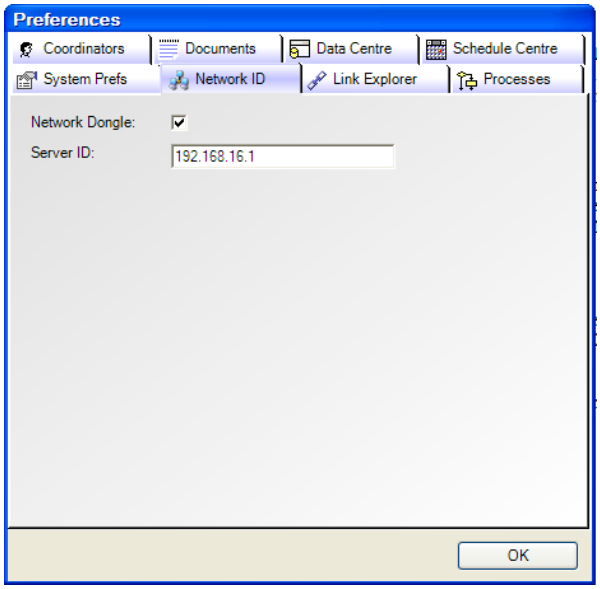
This allows the Administrator to specify a Document Group that will be used specifically for Training Modules. This is an integral part of the Training System and the in-built Training functions within Dolphin will not work properly unless training Module filenames begin with the two letter designator specified here.

4.1.11. Sort User Centre by:

When accessing the User Centre from the Dolphin Main Page, the list of Users is presented on the screen as a section of the full list and you must scroll up or down to find the User whose details you want to access. This Preference allows you to list the Users by Company ID/Employee Number, Alphabetically by Surname or Alphabetically by Departmental grouping.

4.2. Network ID

This tab contains the data relating to network dongles.



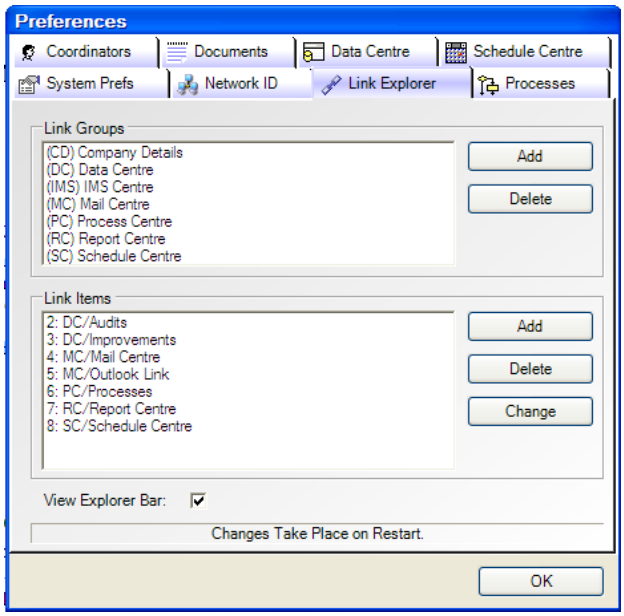
The Network Dongle box is ticked if this option is used and the Machine name containing the dongle is entered into the Server ID: field. For network support, see your reseller for full installation details).

For a stand alone system, the IP Address should be 127.0.0.1, the address of a local machine.

A Static IP Address can also be used.

4.3. Link Explorer

This tab contains the grouping and item links for the Overview Explorer Bar. (See the Explorer Bar section for the items that can be added.).

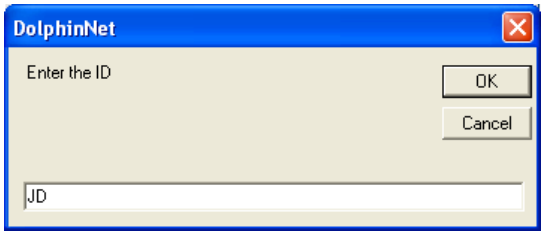


In the Link Explorer items can be added and grouped however the User wishes. The same file can appear in more than one group.

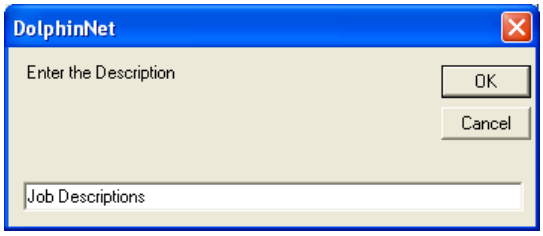
Any changes made only become effective after restarting Dolphin.

4.3.1. To add a Group

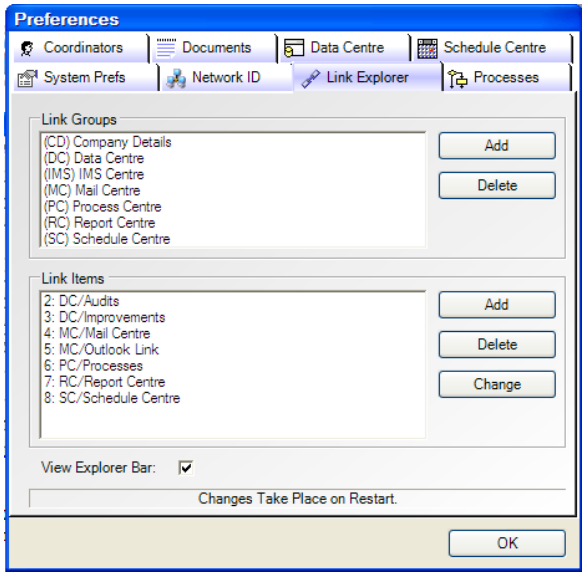
Click on the “Add” button in the Link Groups area. You will be prompted to insert the ID of the Group. This can be any unique identifier such as “L1” for Level 1, “G2” for Group 2, “JD” for Job Descriptions, etc.



After inserting the ID, press “OK” to take you to the next screen. Insert a brief description. This is the text that will appear as a Group Heading on the Explorer Bar.

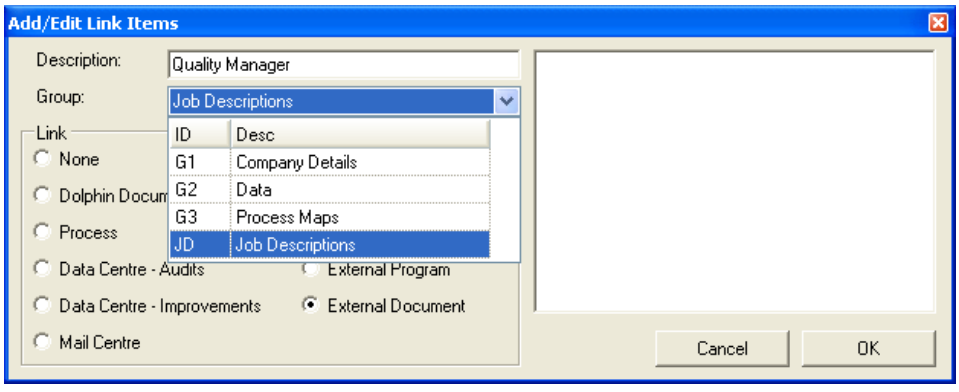


Then press “OK” and your new Group will be added to the list of Groups in the Link Explorer.

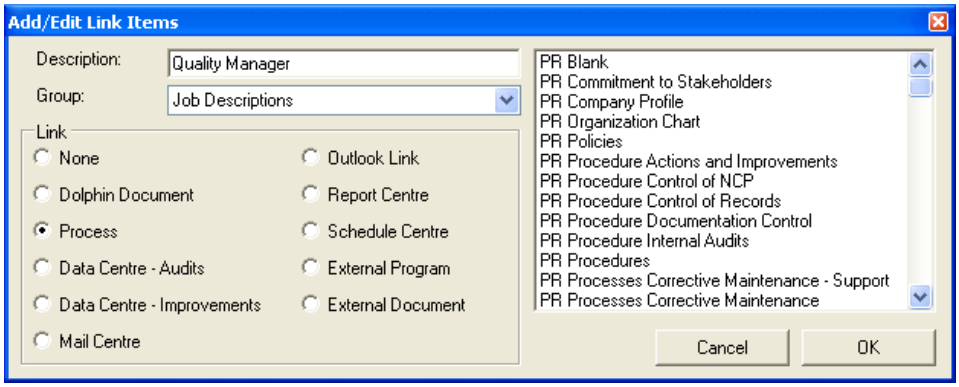


4.3.2. To Link Items to a Group

Select the “Add” button in the Link Items area. On the next screen, add the Description for the file and select the Group from the drop down list. This description will appear on the Explorer Bar as an Item listed within the Group.



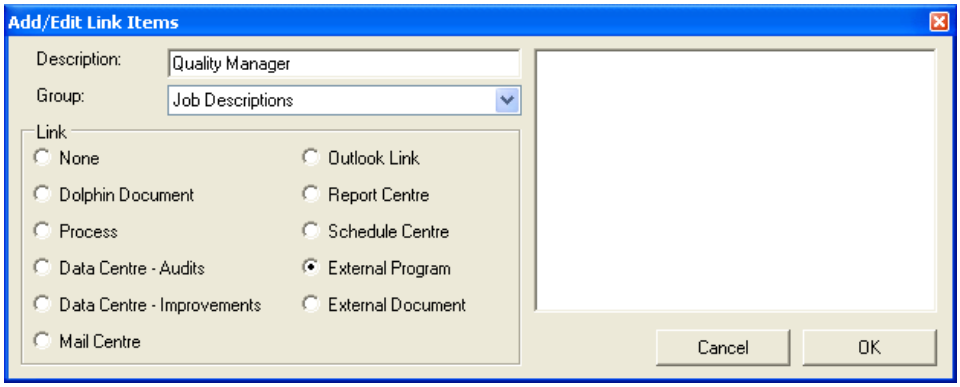
You then have the option of linking any file type to the Description that will appear in the Explorer Bar. If you select Dolphin Documents or Dolphin Processes, the list of available files will appear in the right hand panel.



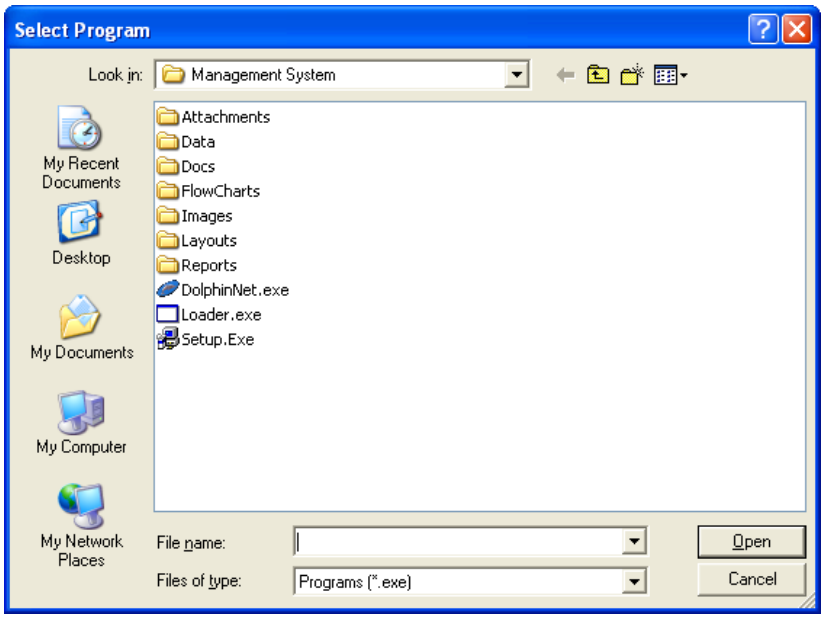
For all other sections within Dolphin (Data Centre, Mail Centre, Outlook Link, Report Centre or Schedule Centre) simply select the radio button and click on “OK”. The link has now been set up to access those areas directly from the Explorer Bar.

To leave the Item in the list but disable any links, select “None” from the list then click on “OK”.

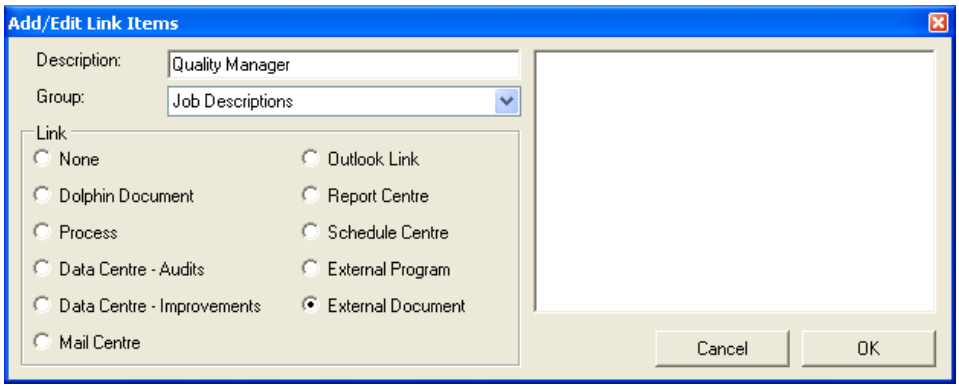
External Programs can be launched automatically from the Explorer Bar by creating the Link Item here. Select the “External Program” radio button and click on “OK”.



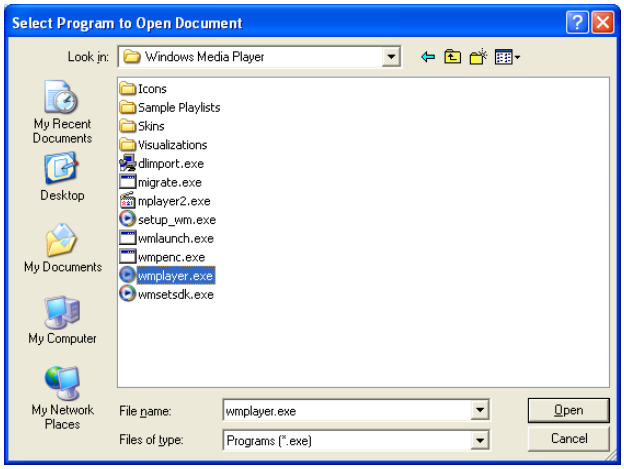
You can now browse for the executable file (.exe file) to launch the specified programme.



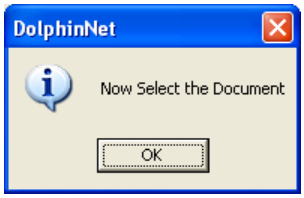
To launch an External Document directly from the Explorer bar, select the External Document radio button and click on the “OK” button.



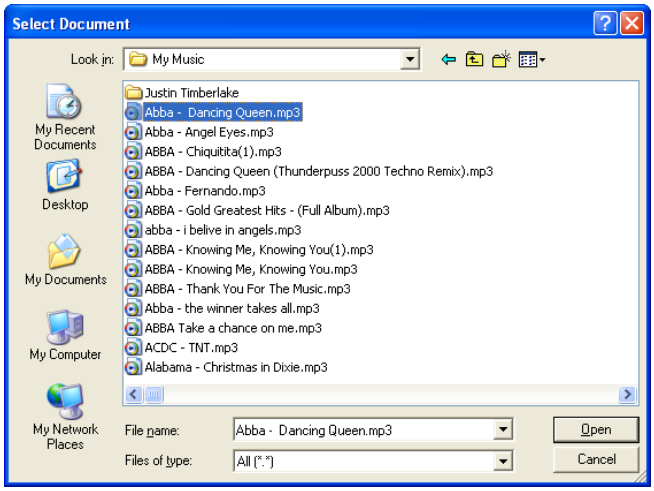
You can now browse for the executable file (.exe file) required to launch the file.



When you have selected the executable file, click on the “Open” button and you will get a reminder to select the file that you want to open.



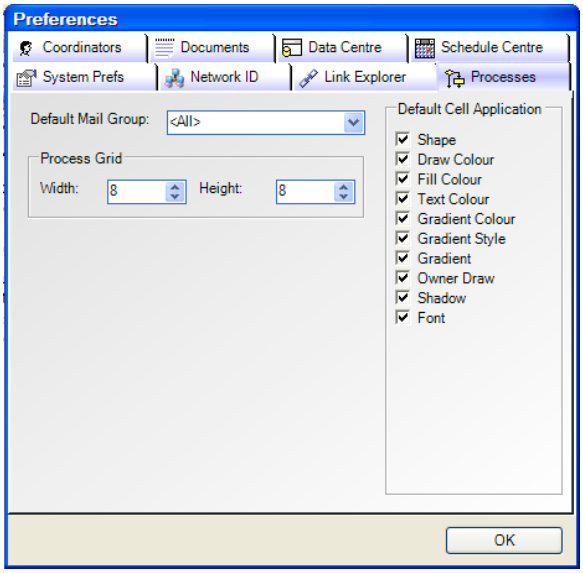
Click on the “OK” button and you will be presented with a second browse screen. Now browse to find the file that you want to open. When selected, either double-click the file name or highlight it and click on the “Open” button.



The required file and programme will be associated with that Item on the Explorer Bar and can be launched by selecting the Item in the relevant Group.

4.4. Processes

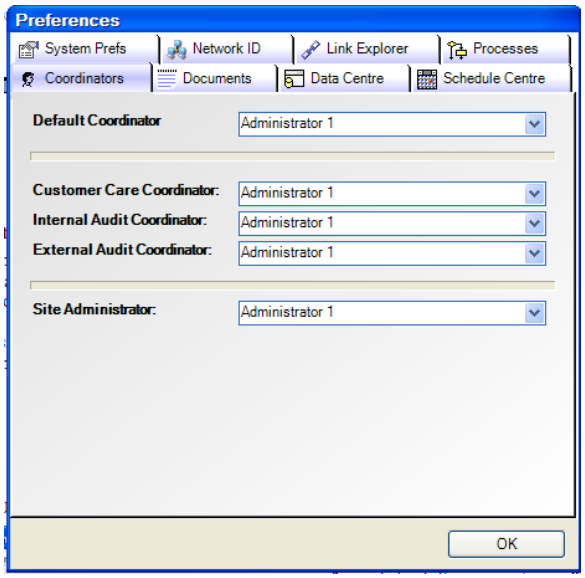
This tab contains the standard process grid size for creating process maps and defines which properties are copied on the Set Default Cell command in the Process Centre (See Section 7). These settings will apply to all Process Maps created in this version of Dolphin and will apply across the whole company.



Additionally, a default mail group for Process Maps can be assigned in this section. This is important if a particular department, e.g. Human Resources, must be kept informed of all changes made to process maps.

4.5. Coordinators

Certain functions within Dolphin need a designated Coordinator. This is mainly for reporting and notifications in a default situation.



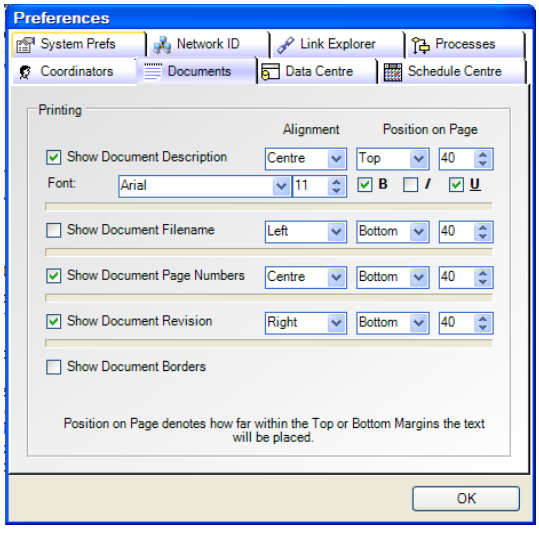
One person can be designated as the “Default Coordinator” for all specified functions. This is done in the Default Coordinator function on the Preferences Tab.

To designate individual functions to individual person, use the Coordinators Tab and select the relevant Coordinator from the drop down list for each function.

Under the Coordinators tab there is the Site Administrator function. When ticked, this allows this person to enter Windows Login data in the user database & administer the Dolphin Event Checker (DEC).

4.6. Documents

Documents within the IMS Centre are meant to be live documents. As soon as they are printed out, they are no longer “live” and are therefore uncontrolled.



The Administrator can set up on this Tab how these documents will be printed out. The options are to add page number, revision, filename and/or document description into the header or the footer of the document and align it left, centre or right.
These changes will be in addition to the headers and footers created in the page setup area of this document and as such enough room must be left to cater for these.

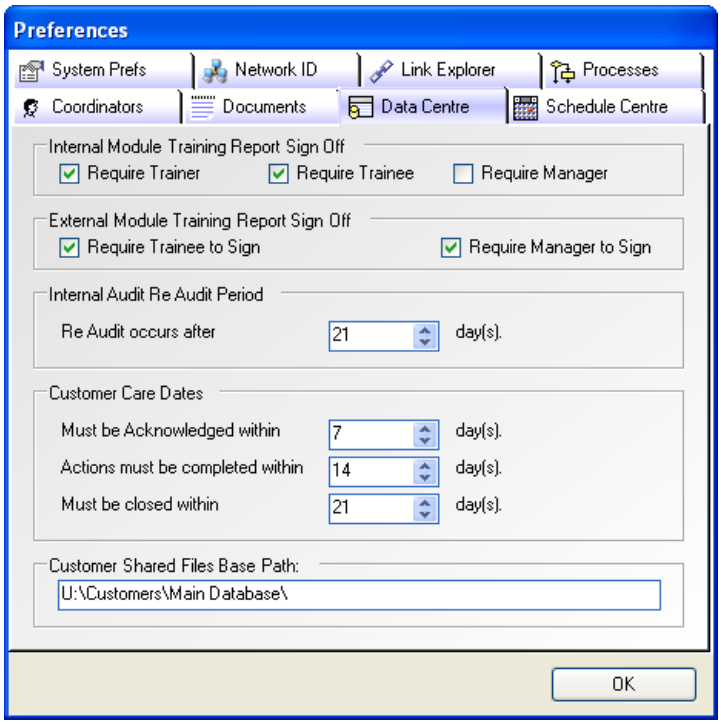
Font and Font size can be programmed from this tab.

The document will also be printed with a marquee at the bottom centre of each page. This contains the User Name and date of printing along with the legend “UNCONTROLLED WHEN PRINTED”. Additionally, the documents can be printed with a blue border denoting the margins of the pages of the documents being printed.

Once set by the Administrator, these items will appear on all documents printed by the IMS Centre.

4.7. Data Centre

Clicking on the Data Centre tab allows you to specify who the people are who have the authority to sign off the Training Report stage of a Training Record, This will also allow External Training Records to be signed off.

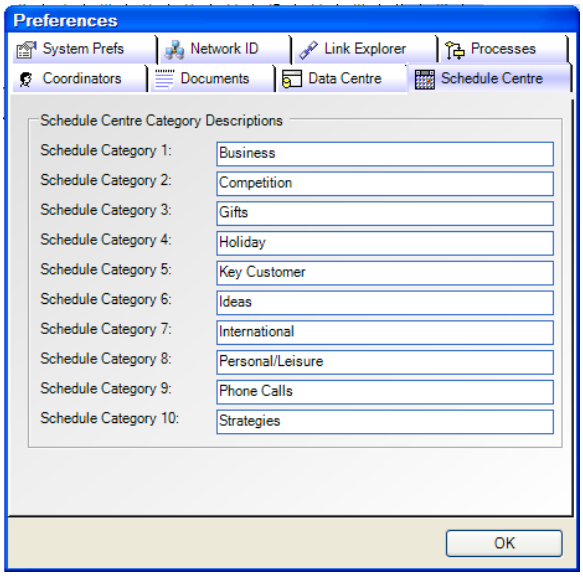


The target dates for to acknowledge, complete action and close out any customer care issues are input in this tab.

Additionally, it is possible to specify a file path if customer data is held in another location, e.g. on the server. The file path for the customer information should be recorded in the “Customer Shared Files Base Path” box, as above. This information is required when setting up a new customer record.

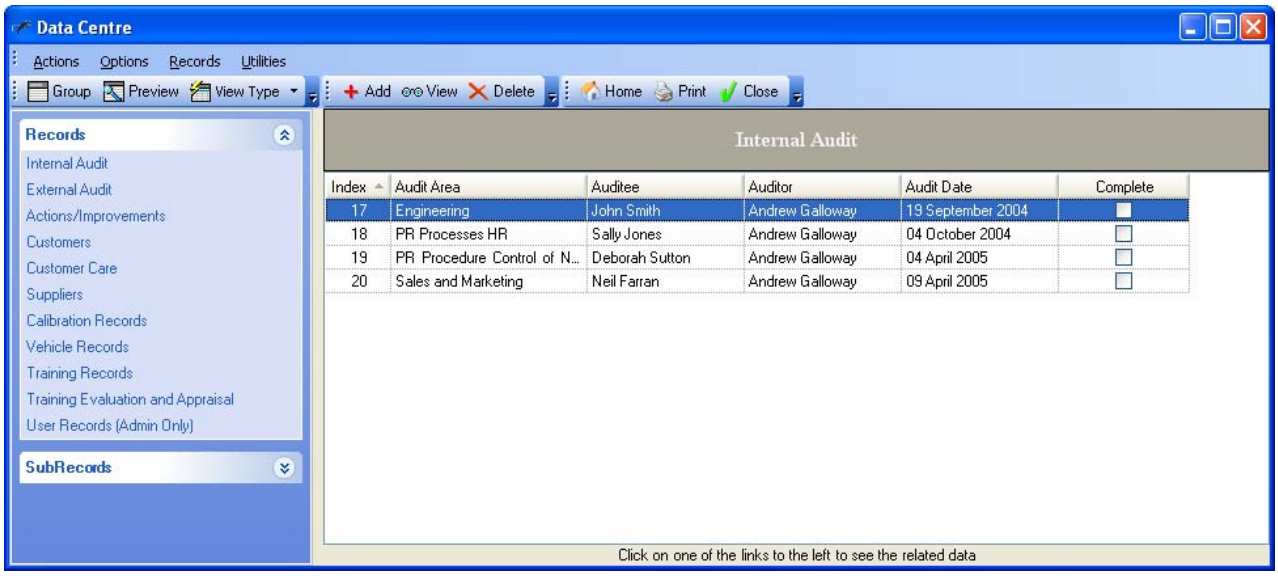
4.8. Schedule Centre

If required the various categories can be identified via this tab.



Chapter 5. Data Centre

5.1. Introduction



The Data Centre is the heart and soul of all the data storage within Dolphin. It stores data relating to Subrecords and Records. The Subrecords information is only available to Administrators. Information in Subrecords is used to compile the Records. This means that many records are fully customizable to suit any specific application.

Many of the functions available from the toolbars and menus are also available from a pop-up menu that appears when you right click on the grid - the list of records in the main panel.

5.1.1. Toolbar

5.1.1.1. Group

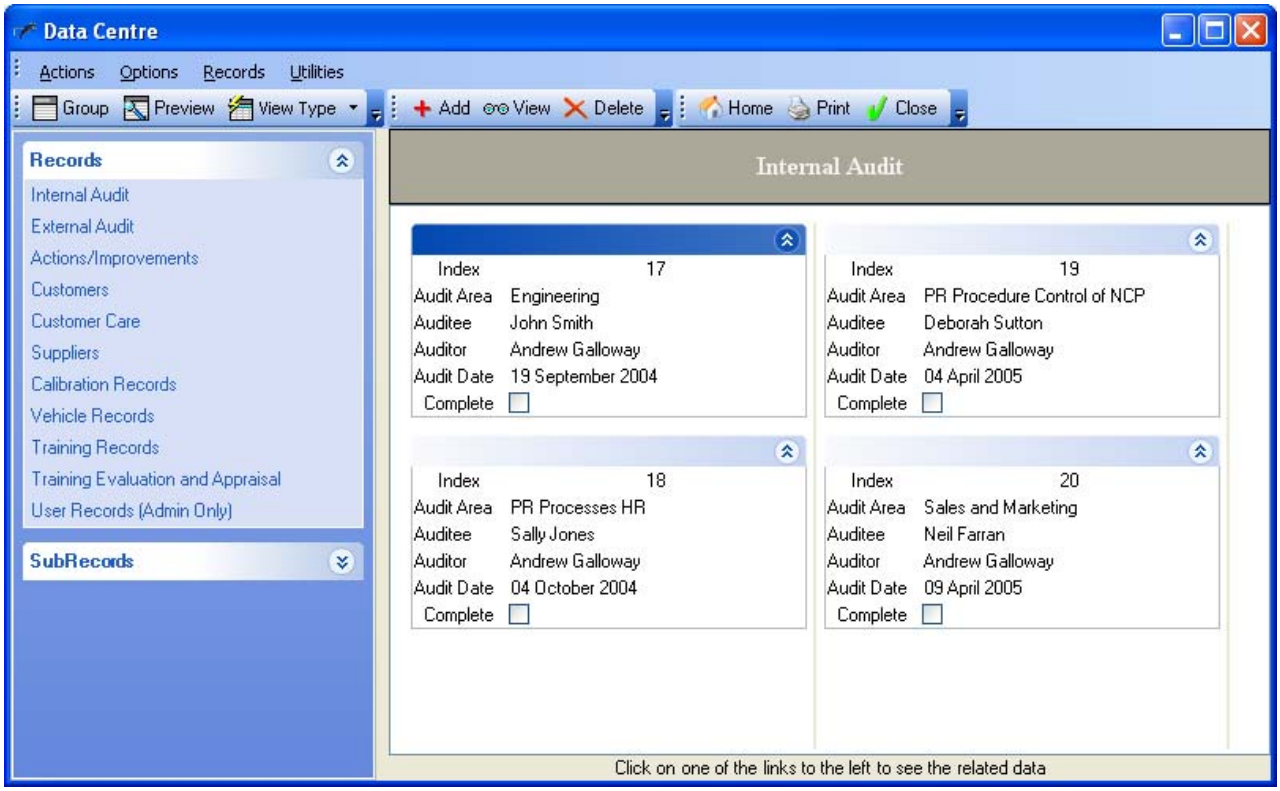
Pressing this button will add a grouping bar to the data grid. Column headers can be dragged into this area to group the data by this field, pressing the button again will remove the grouping bar, though the grouping specified is still performed until another grouping is selected or this grouping is undone. (See Creating Sorts on Groups)

5.1.1.2. Preview

Pressing this button will add an extra row which previews a row of data for each record in the data set. Pressing again removes this preview row. (Preview rows are only available in Table View). The Preview Row normally contains the “Brief” information from Audit Records, Actions, etc.

5.1.1.3. View Type

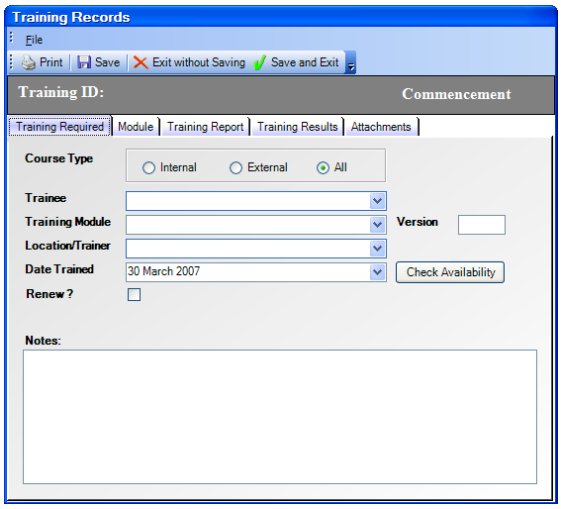
Clicking the triangle to the right of this button will show a drop down box from which the View Type can be selected. The options are Table view as displayed above and card view which gives a box for the fields of each record.



5.1.1.4. Add

Pressing this button performs one of 2 actions dependant on whether you are looking at Records or Subrecords.

- Records will go to a separate screen to enter detailed data.
- Subrecords When information needs to be added to a subrecord within the Datacentre click on the relevant subrecord this will create a popup box to appear in the middle of the screen which needs to be fully completed with all the required information.



← This is an example popup box which is used for creating a subrecord for training.

5.1.1.5. View

This opens up a screen showing the whole data for a particular record. (Not for Subrecords) In this screen record data can be amended, if the current User has the correct authorities to do so.

5.1.1.6. Delete

This button deletes the selected record. Please note that some records cannot be deleted (e.g. Internal Audits.) This is for technical reasons. Other records can only be deleted by the person authorized to do so.

5.1.1.7. Show All Fields

This function is only available to users with Administrator privileges. It allows all subrecords within the field to be displayed. Due to security restrictions, the “show all” field is not available in the user records section.

5.1.1.8. Print

This takes the User to the Report Centre and opens a Detailed Report of the current record, if applicable.

5.1.1.9. Done

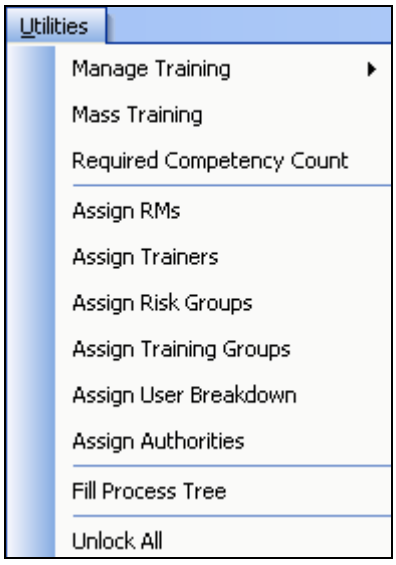
This closes the Data Centre and returns you to the Main Page.

5.1.2. Menu Bar

The Menu Bar in the Data centre follows the conventions of the Other Dolphin Menu Bars. However, the following items are available only in the Data Centre.

5.1.2.1. Utilities Menu

Under the Utilities drop-down menu there are the following options:



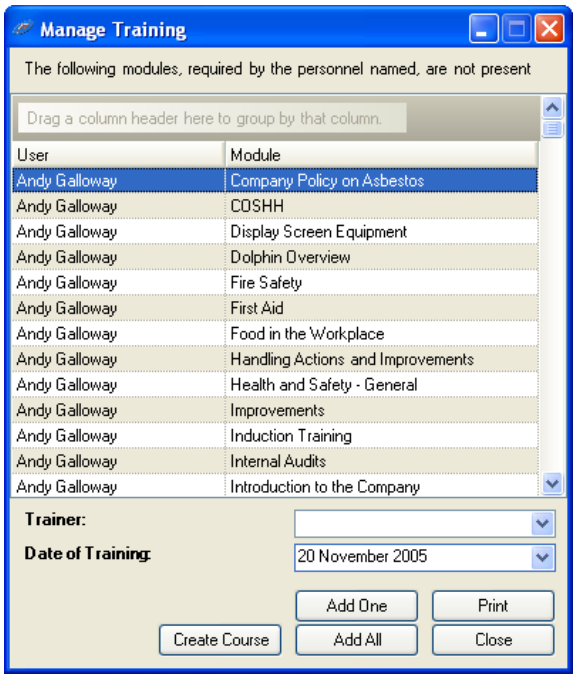
The Manage Training option gives three further options: Missing Required Modules, Passed Renewal Date and Updated Training Module. This Chapter covers the functionality of each of these areas.

Manage Training

The Manage Training option gives three further options: Missing Required Modules, Passed Renewal Date and Updated Training Module.

Missing Required Modules

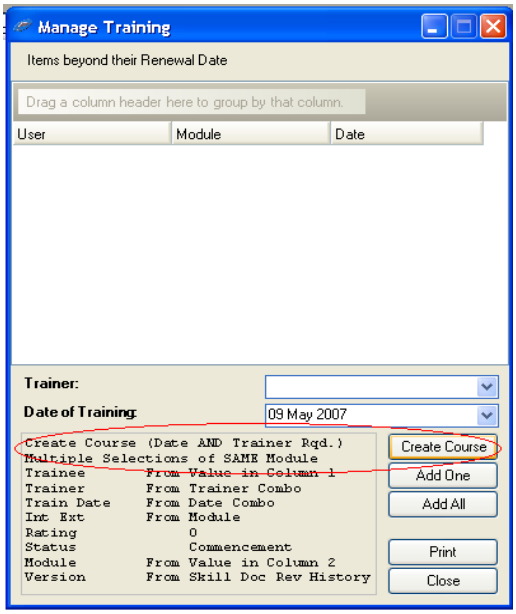
When there are Required Modules that are outstanding, this menu option provides a utility that allows you to view the list and allocate Training to personnel, either as individual training sessions or where the same module needs to be trained to more than one individual, a course can be created.



To create a Training Record from this utility, select the training module from the list, add a Trainer from the drop-down list and select a date that the training will take place on. Clicking on the “Add One” button creates a single Training Record and entries are added to the Schedule Centre for the Trainer and the Trainee for the specified date.

Multiple Training Records can be selected in one go by selecting the required Training Module from the list, adding a Trainer from the drop-down list and selecting a date that the training will take place on, then click on the “Create Course” button. Training Records will be created not only for the specified person, but also all other personnel that require training on the highlighted training module will be added to the Training Records, one record for each person for the specified date.

If the cursor hovers over the “Create Course” button it will display the actions and requirements for that function as shown below. Similarly if the cursor hovers over the “Add One” or “Add All” buttons it will display the requirements and actions of these buttons in the adjacent box. This assists a user in identifying the most appropriate course of action and aims to reduce the possibility of making an incorrect choice, e.g. selecting “Add All” when actually the User wished to create a course.

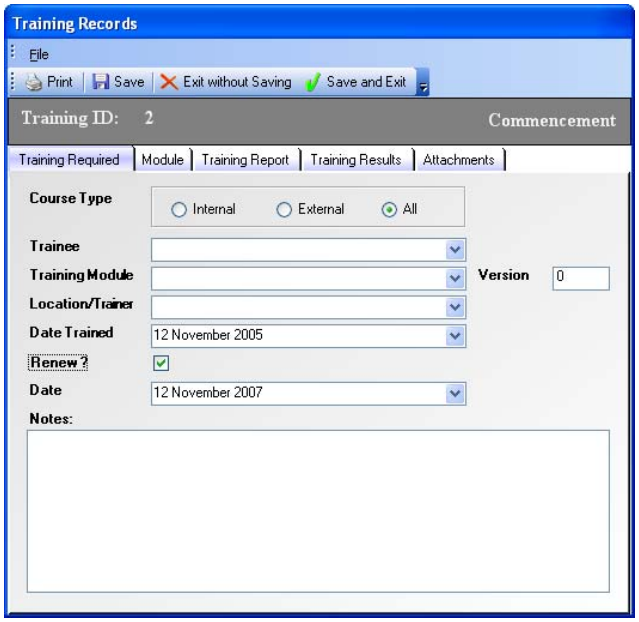


All listed training can be allocated by clicking on the “Add All” button. This option creates a Training Record for each entry on the list for the date specified, but does not allocate a Trainer to the Training Record. The Trainer must be added manually by opening the Training Record and selecting the Trainer from the drop-down list. See Training Records.

The “Print” button causes a list of all outstanding Required Modules training to be printed. The “Close” button closes down the utility.

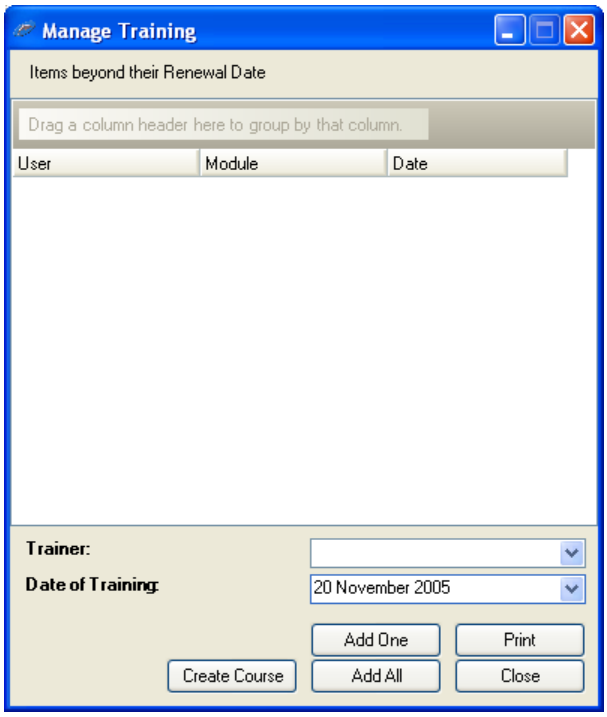
Passed Renewal Date

Training that has a shelf-life (i.e. needs to be renewed every two years such as Fork Lift Truck Operator, First Aid Training, Grade 2 Welder, etc) is marked in a Training Record as being “Renewable” (the “Renew?” box is ticked). The Training Record then has an additional date inserted to show when the training should be repeated. The default date is 2 years but can be set to any date.



When this record is saved, the Renew date is added to the Schedule Centre and will appear on the list of training modules that are overdue to be renewed. Therefore, it is suggested that the renewal date is set for a period of time earlier than the actual renewal date, i.e. if the Utility is checked every month and the training takes a month to organize, set the renewal date for two months before the actual expiry date of the current training.

This utility is accessed from the Utilities Menu, Manage Training, Passed Renewal Date and produces the following utility screen.



To create a Training Record from this utility, select the renewable training module from the list and add a Trainer from the drop-down list and select a date that the training will take place on. Clicking on the “Add One” button creates a single Training Record and entries are added to the Schedule Centre for the Trainer and the Trainee for the specified date.

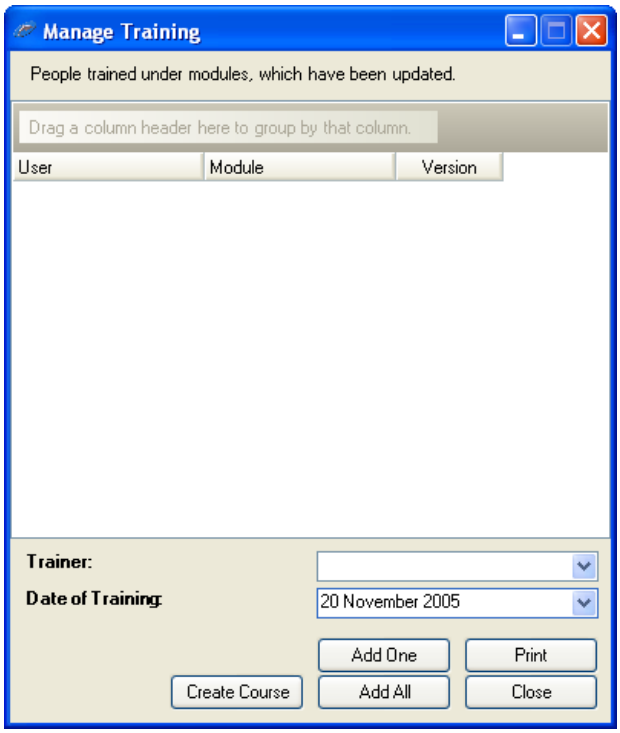
Multiple Training Records can be selected in one go by selecting the renewable training module from the list and add a Trainer from the drop-down list and select a date that the training will take place on, then click on the “Create Course” button. Training Records will be created not only for the specified person, but also all other personnel that require training on the highlighted training module will be added to the Training Records, one record for each person.

All renewable training can be allocated by clicking on the “Add All” button. This option creates a Training Record for each entry on the list for the date specified, but does not allocate a Trainer to the Training Record. The Trainer must be added manually by opening the Training Record and selecting the Trainer from the drop-down list. See Training Records.

The “Print” button causes a list of all Renewable Training that is Passed Due to be printed. The “Close” button closes down the utility.

Updated Training Module

When Training Modules are amended in the IMS Centre, their version number is incremented. The training function within Dolphin is notified of a change to a Training Module. This menu option provides a utility that allows you to view the list of updated Training Modules where the update has not yet been trained to personnel trained to an earlier version of the Training Module. From this utility you can allocate Training to personnel, either as individual training sessions or where the same module needs to be trained to more than one individual, a course can be created.



To create a Training Record from this utility, select the updated training module from the list and add a Trainer from the drop-down list and select a date that the training will take place on. Clicking on the “Add One” button creates a single Training Record and entries are added to the Schedule Centre for the Trainer and the Trainee for the specified date.

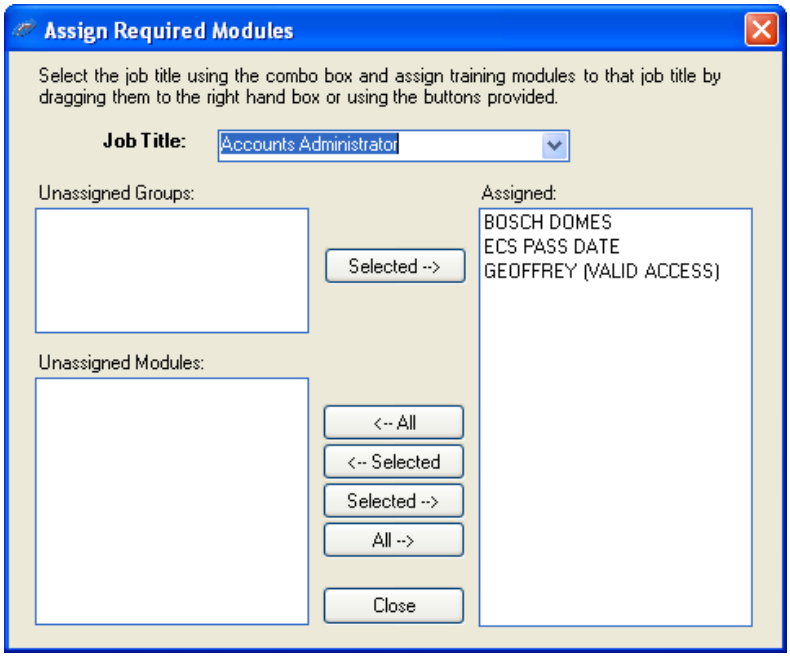
Multiple Training Records can be selected in one go by selecting the updated training module from the list and add a Trainer from the drop-down list and select a date that the training will take place on, then click on the “Create Course” button. Training Records will be created not only for the specified person, but also all other personnel that require training on the highlighted training module will be added to the Training Records, one record for each person.

All updated training can be allocated by clicking on the “Add All” button. This option creates a Training Record for each entry on the list for the date specified, but does not allocate a Trainer to the Training Record. The Trainer must be added manually by opening the Training Record and selecting the Trainer from the drop-down list. See Training Records.

The “Print” button causes a list of all Updated Training to be printed. The “Close” button closes down the utility.

Assign RMs

Required Modules are allocated to each Job Description within the Company, as detailed in the Subrecords section. This Utility allows Training Modules to be added to and removed from a Job Description. By selecting Utilities, Assign RMs you are taken to the following screen:

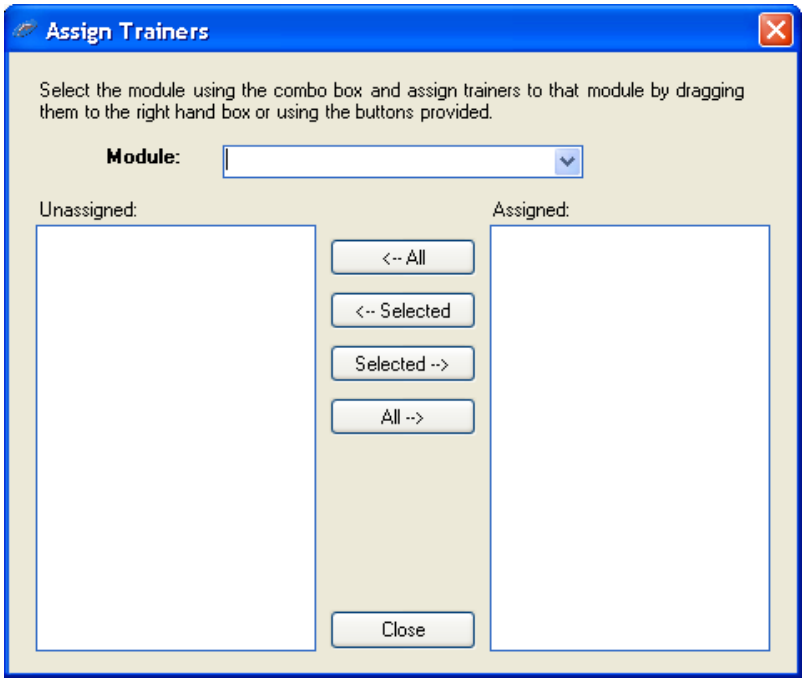

Assign Required Modules
Select the job title using the combo box and assign training modules to that job title by dragging them to the right hand box or using the buttons provided.
Job Title:
Accounts Administrator
Unassigned Groups:
Assigned:
BOSCH DOMES
ECS PASS DATE
GEOFFREY (VALID ACCESS)
Selected -->
Unassigned Modules:
<-- All
<-- Selected
Selected -->
All -->
Close

You can see the list of Training Modules that are not assigned to that Job Title and those that are. Using the buttons transfers the Training Modules from one list to the other. Close the utility down by using the “Exit” button in the top right of the form.

Additionally, if a job title is associated with more than one training group it is possible to select the required training groups from the “unassigned” list. Choosing “select” will move those groups to the “Assigned” box. The purpose of this facility is to make mass assignments easier and faster.

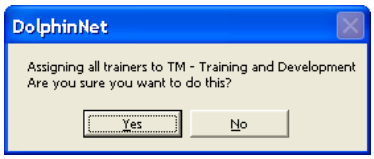
Assign Trainers

This works in a similar fashion to the “Assign Required Modules” Utility. Selecting the “Assign Trainers” button from the drop-down list under Utilities will bring up the screen below:


Assign Trainers
Select the module using the combo box and assign trainers to that module by dragging them to the right hand box or using the buttons provided.
Module:
Unassigned:
Assigned:
<-- All
<-- Selected
Selected -->
All -->
Close

The User selects the module required. A list of User names will appear in the unassigned column. The relevant name should be highlighted by clicking on it and then the "Selected" button (shown below) will move the User to the "Assigned" column.

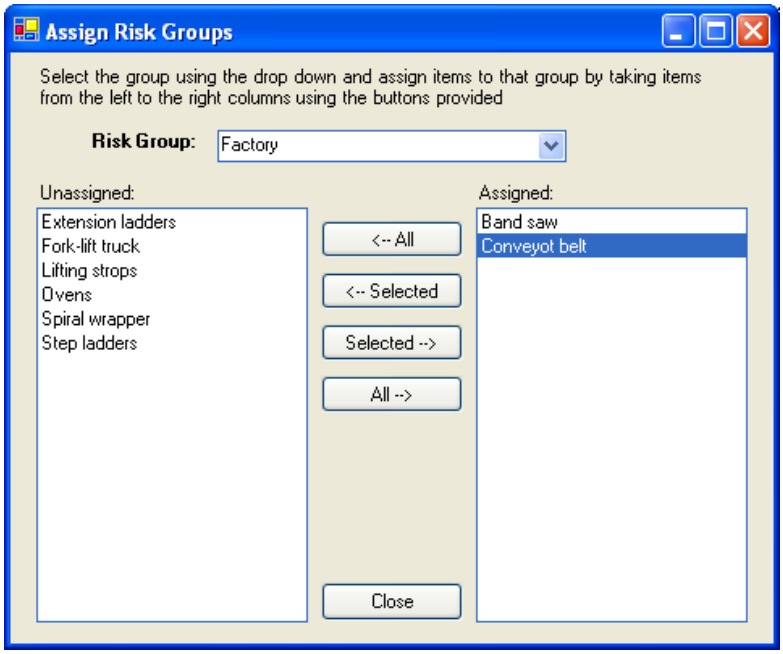
In the event that all the Users listed are to be chosen as Trainers the "All" button is chosen. This will bring up a prompt window, which asks:



If all Users are to be assigned as trainers, select "Yes". If the button was clicked in error, select "No" and the relevant names can be highlighted, selected and assigned to the role of trainer for that module.

Assign Risk Groups

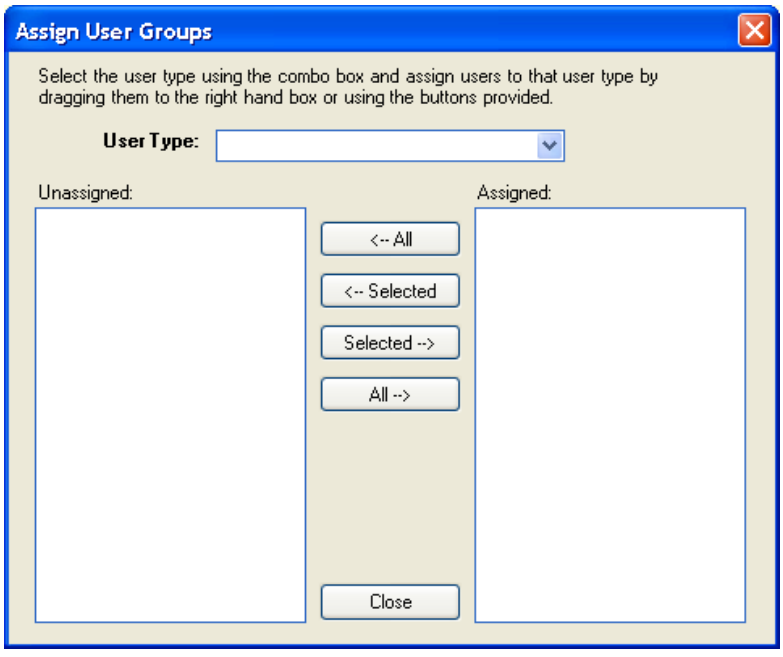
It is possible to assign items or activities to risk groups via the utilities menu. A window as shown below will appear and this will enable the Risk Assessor to assign various activities or items to a risk group in one operation.



Assign Training Groups

Assign User Breakdown

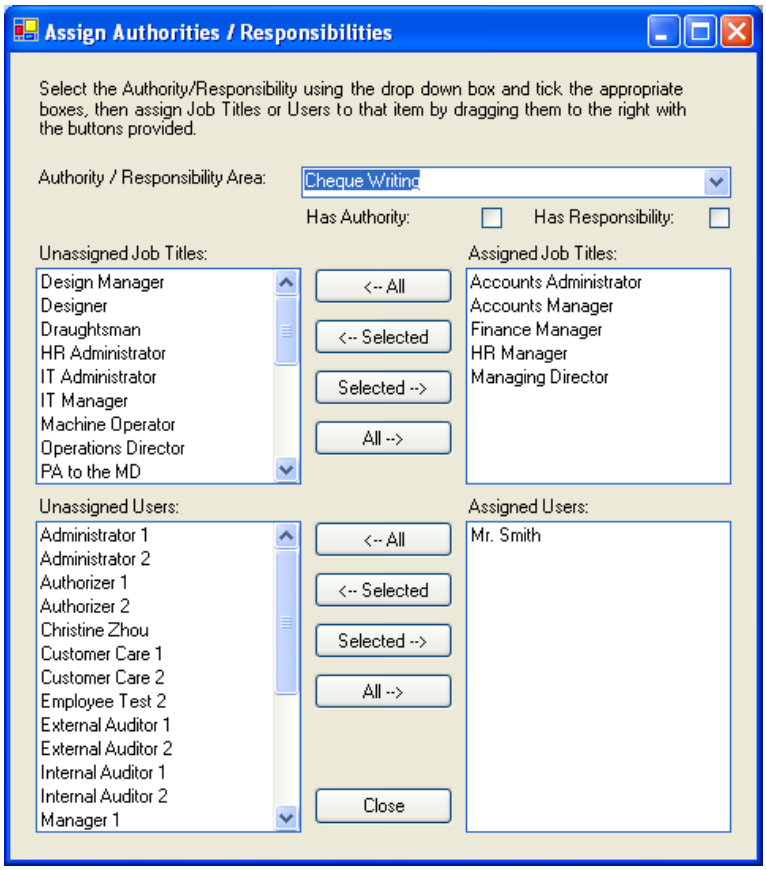
This facility allows users to be added to and removed from user types in multiple, e.g.


Assign User Groups
Select the user type using the combo box and assign users to that user type by dragging them to the right hand box or using the buttons provided.
User Type:
Unassigned:
<-- All
<-- Selected
Selected -->
All -->
Close
Assigned:

Users are moved from assigned to unassigned and vice versa in the same way that Trainers or Required Training Modules are assigned.

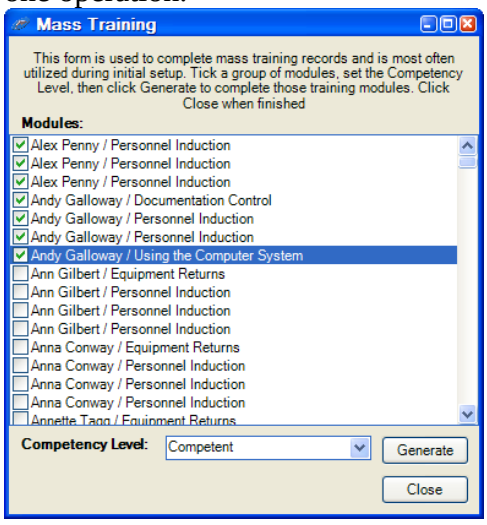
Assign Authorities / Responsibilities

This function allows the Administrator to assign specific responsibilities or authorities, e.g. cheque writing, purchase order sign off, etc. The authority or responsibility area is selected from the drop down list, as shown below. The Administrator can then choose to assign this area of responsibility to a particular job title and indeed to a particular individual.



Mass Training

This facility is normally utilized at Setup. Once training has been allocated to Required Modules in the sub records and job titles have been allocated to staff in the User Centre. During loading Dolphin checks the outstanding Required Modules for each user. This utility allows all of the "outstanding" Required Modules that are created when a new system is set up, to be signed off in one operation.


Mass Training
This form is used to complete mass training records and is most often utilized during initial setup. Tick a group of modules, set the Competency Level, then click Generate to complete those training modules. Click Close when finished
Modules:
Alex Penny / Personnel Induction
Alex Penny / Personnel Induction
Alex Penny / Personnel Induction
Andy Galloway / Documentation Control
Andy Galloway / Personnel Induction
Andy Galloway / Personnel Induction
Andy Galloway / Using the Computer System
Ann Gilbert / Equipment Returns
Ann Gilbert / Personnel Induction
Ann Gilbert / Personnel Induction
Ann Gilbert / Personnel Induction
Anna Conway / Equipment Returns
Anna Conway / Personnel Induction
Anna Conway / Personnel Induction
Anna Conway / Personnel Induction
Competency Level:
Competent
Generate
Close

After clicking utilities select "Mass Training" tick each of the training modules you regard as having been completed by that individual through Training, experience or qualification.

Once selected choose the competency level you are going to assign to those selected modules and then click on generate. All the selections you have made will now be deemed to be completed and as such Dolphin will not generate reminders to complete those training modules. A full record list is available after generation to allow checking for errors.

Unlock All

If the software closes with records open i.e. due to a system crash or network error, the system does not have a chance to close down the records properly. To prevent corruption of data, the record is not available to be opened whilst the system registers it as already open. To use this system, all users must log out and close Dolphin down except the Administrator that is going to perform the "Unlock". In the Data Centre, from the Explorer Bar, select the record type that needs to be unlocked so that the locked record is one of those in the list in the main panel.

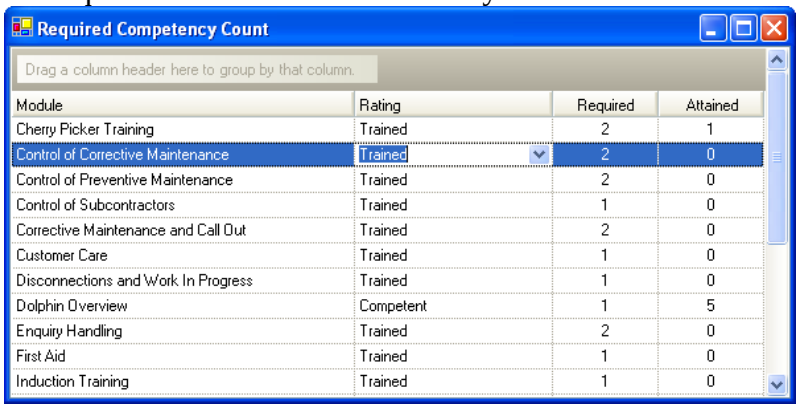
Select the Utilities Menu, Unlock All. You will be asked to verify that all users are out of Dolphin.

Click the "No" button cancels the Unlock operation. Clicking the "Yes" button allows a routine to be run on all records, setting their "Open" flag to show that it is closed. This is confirmed by the system when completed.

Clicking the "OK" button end the Unlock process and other users can log back in to the system.

Required Competency Count

The Required Competency Count in the Utilities menu shows the required competency levels which are required and have been attained by a user. The screen shot below demonstrates this more fully.



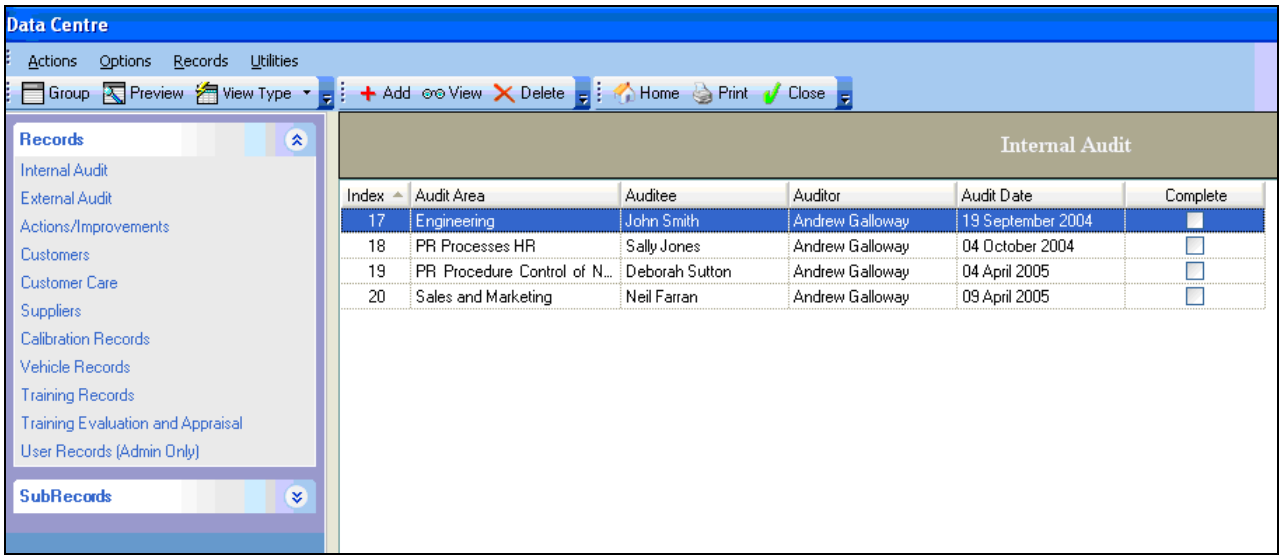
Module	Rating	Required	Attained
Cherry Picker Training	Trained	2	1
Control of Corrective Maintenance	Trained	2	0
Control of Preventive Maintenance	Trained	2	0
Control of Subcontractors	Trained	1	0
Corrective Maintenance and Call Out	Trained	2	0
Customer Care	Trained	1	0
Disconnections and Work In Progress	Trained	1	0
Dolphin Overview	Competent	1	5
Enquiry Handling	Trained	2	0
First Aid	Trained	1	0
Induction Training	Trained	1	0

Fill Process Tree

5.2. Explorer Bar

The explorer bar changes the view for the User to display the differing types of data stored in Dolphin. These are described below.

5.2.1. Records



"Records" are the actual records created by running the Management System. They include such things as Internal Audits, Training Records, Minutes of Meetings, Vehicle Records, etc. This is generally the information that can be output to the Reports Generator in the Reports Centre. Records are made up from Subrecords and data. This approach gives maximum flexibility when setting up the system initially, but ensures that the system is run in compliance with predefined parameters. This is achieved by arranging that critical data is selected for inclusion in a Record from a specified list within the Subrecords.

When a user saves a record, e.g. internal audit, within their "My documents" subfolder any changes to the grouping and sorting of the record will be retained upon return to that record. These records include:

- Internal Audits
- External Audits
- Actions / Improvements
- Customers
- Customer Care
- Suppliers
- Training Records
- Employee Evaluation
- Users
- Meetings
- Equipment Checks
- Risk Assessment

5.2.1.1. Use of Toolbars in Records

The toolbar buttons along the top of the forms that contain Records provide the following functionality. Not all functions have been enabled within all Records, but where the button is available, it has similar functionality throughout the Data centre:

Add Action

. . . allows the auditor to raise an Action (Correction, Corrective Action or Preventive Action) and have it associated with this Record. This will only available in Records where there is a tab to store the resultant Action and these will appear in the "Actions/Improvements" tab.

Add Improvement

. . . allows the auditor to raise an Improvement and have it associated with this Record. These will appear in the "Actions/Improvements" tab. This will only available in Records where there is a tab to store the resultant Action and these will appear in the "Actions/Improvements" tab.

Save

. . . does what it says on the icon. Normally you would use this when you have input a reasonable amount of data, haven't finished writing up the Record but don't want to risk losing the data if there is a crash or network problem.

Print

. . . takes the User to a Detail Report of this Record generated by the Report Centre.

Exit without Saving

. . . cancels the Record without assigning it a Record Number and closes the report form.

Save and Exit

. . . is the more normal option. This causes the data to be written to the database for that information type and to be allocated the next Record Number. Once saved, the record cannot be deleted.

Attachment Tabs

Within all Records, the tabs should be followed through in a logical order from left to right. Where a record has an "Attachment Tab", the functionality for the buttons is as follows:

To View a document, select it from the list and click on "View". Dolphin interrogates windows to find out what programme should be used to open a file of this type, then runs the programme and opens the file.

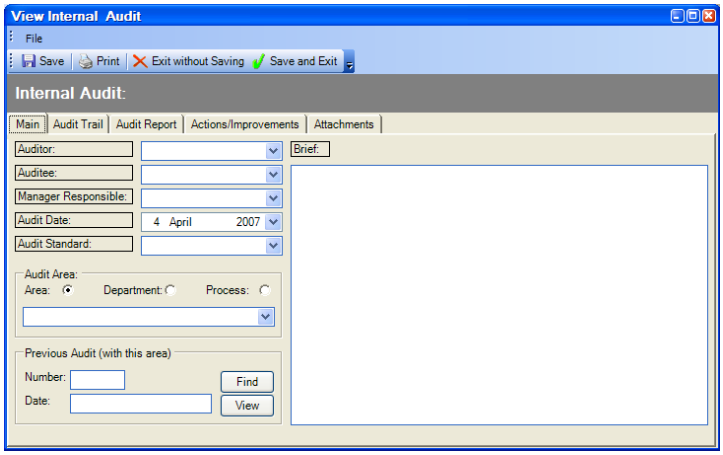
To Add a document, click on the "Add" button, browse to find the file you want to import and click on the "Open" button. Dolphin makes a copy of the document in a secure location and adds an entry to this table so that the document can be viewed as necessary.

To remove a document from the list, select it from the list and click on "Remove". If you have the right authorities, the document will be removed from the list. If not, you will be given a warning that you do not have the correct privileges and that the document will not be removed. Even after removal, the document is still stored in the secure location.

5.2.1.2. Internal Audit

This screen holds all the data relevant to an Internal Audit, including Actions, Improvements and any scanned and attached documents such as external reports and hand-written notes.

The toolbar buttons across the top work in exactly the same way that they do in all other records within the Data Centre.



Main Tab

The first tab holds data about the audit including the auditor, auditee, manager responsible, audit date and the Standard against which the audit is to be performed. The date is automatically selected as today's date, but it can be changed by clicking on the drop-down arrow and selecting a date from the pop-up calendar.

The Auditor should be selected via the dropdown list. It is not possible to enter an auditor's name as free text.

It is also possible to view the last audit to be conducted in that area by entering either the audit number or date on which the previous audit was performed.

The audit area can be selected from the three options, "Audit Area", "Department" and "Process". Whichever is selected will cause the Audit Area box to contain different information.

- "Area" allows free-text to be input into the box. This might be used for a one off audit or a spurious audit of an area such as "Response to Advertising Material after the NEC Exhibition".
- "Department" causes the box to contain a list of all of the Departments as listed in the Subrecords. This can be useful to audit a department for performance appraisal or Cost Centre Analysis.
- "Process" is the more normal process-based auditing. The drop down list would contain a list of all Process Maps, Sub processes and Sub processes contained in the whole system. These audits can be as broad or as detailed as is required.

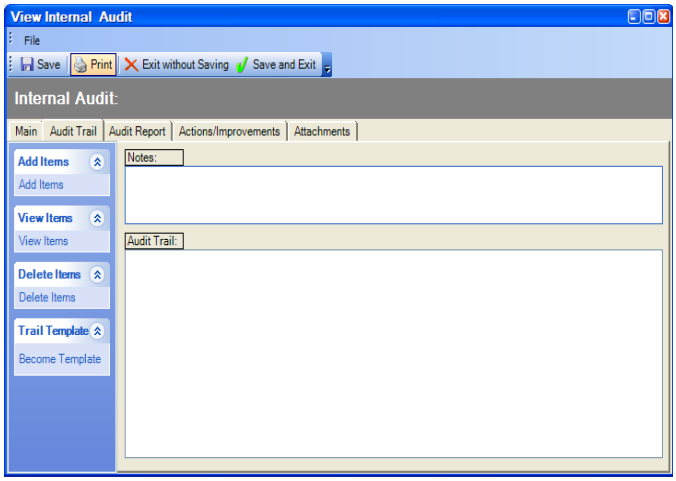
When the Audit Area or Department or Process is selected Dolphin will prompt the user to decide if the "standard" audit trail items are required for this particular audit. Therefore if the area or process is to be audited according to the same format as a previous audit, the Internal Auditor should choose

"yes" and the audit trail items will be populated in the box. If no, the Auditor should enter the audit trail items to be followed up during the audit.

The "Brief" field should contain a brief description of the purpose of the audit, i.e. "Regular compliance audit of the Sales process and Credit Control Process". It also stores the completion flag and whether a re-audit is required.

Audit Trail Tab

The second tab holds the information about the Audit Trail. The auditor should record here the items that he or she would like to check during the audit. For example "Check a selection of Customer Files and ensure that the following documents are included in the file, are properly completed and correctly authorized". A typical Process Audit would have a list of 20 to 30 such statements.



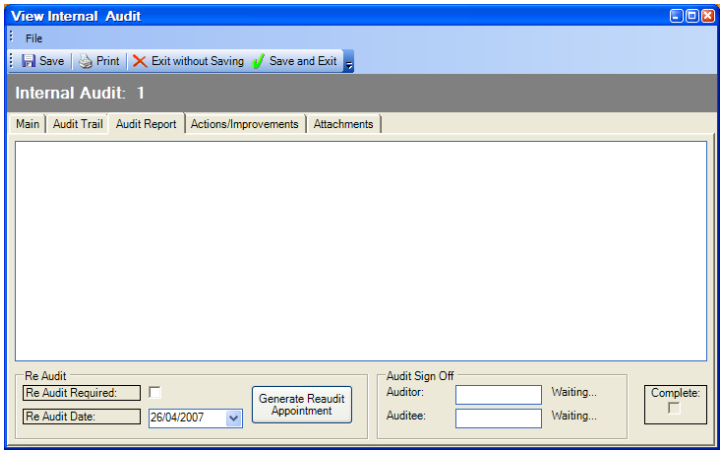
During the audit, the Auditor should make notes of the file names, personnel names, Purchase Order Numbers, Training Record Numbers, Dates, Times, revision numbers, etc that they saw. This should all go in the Audit Trail. At this stage, do not make conclusions about the evidence, just record what was seen. Additionally, if the Audit Trail section is not completed it is not possible to close the audit.

When deleting items within the Audit Trail you will be asked to confirm deletion.

There is the facility to use the current audit trail as a template by selecting the "Audit Trail Template" option from the Explorer bar. This action will erase the default audit trail entries for the current Department or Process and replace them with the current audit trail.

Audit Report

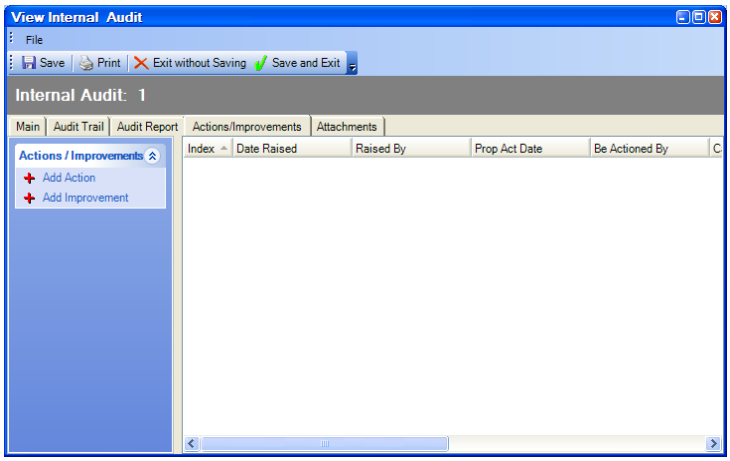
The third tab contains the results of the audit.



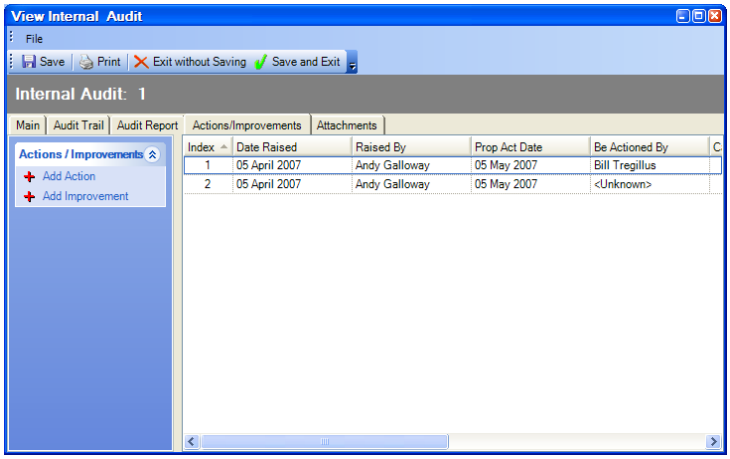
This is where you look back at the Audit Trail and group the information together into meaningful categories. This is where you record statements and conclusions based on the evidence you have gathered. You can if you wish request a Re Audit of the area/process. This is also where you get to Sign off the Audit. Where possible, get the agreement of the Auditee prior to writing these statements, particularly if all is not as it should be. Only state facts and conclusions based on those facts.

Actions/Improvements Tab

The fourth tab holds any Actions and Improvements which are related to the audit. They are created by selecting the "Add Action" button or the "Add Improvement" button.

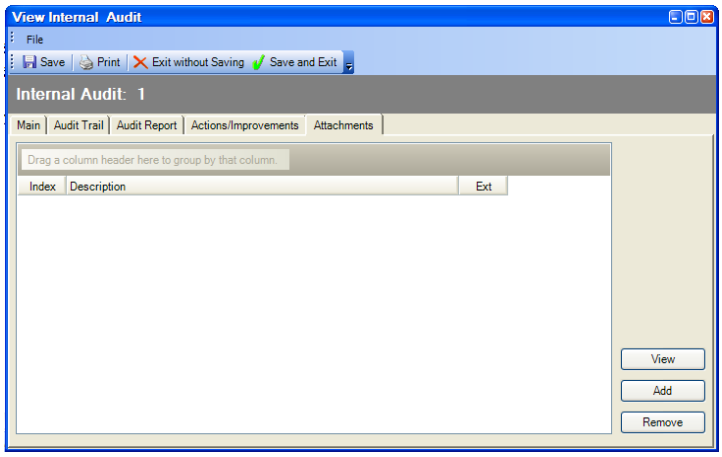


The Actions only get added to the Actions/Improvements tab when they have been raised and saved.



Attachments Tab

The fifth tab is used to attach any documentary evidence that may be relevant to the audit. For example, you might comment that a certain document is in error and attach it to this tab for future viewing. The document will be changed and any evidence of the error will be lost. However, by attaching it to this tab, you preserve a copy of the document "as it is" for future reference.



You can also scan documents such as reports, handwritten notes, Certificates of Training, etc and they will become a permanent part of this Audit Record.

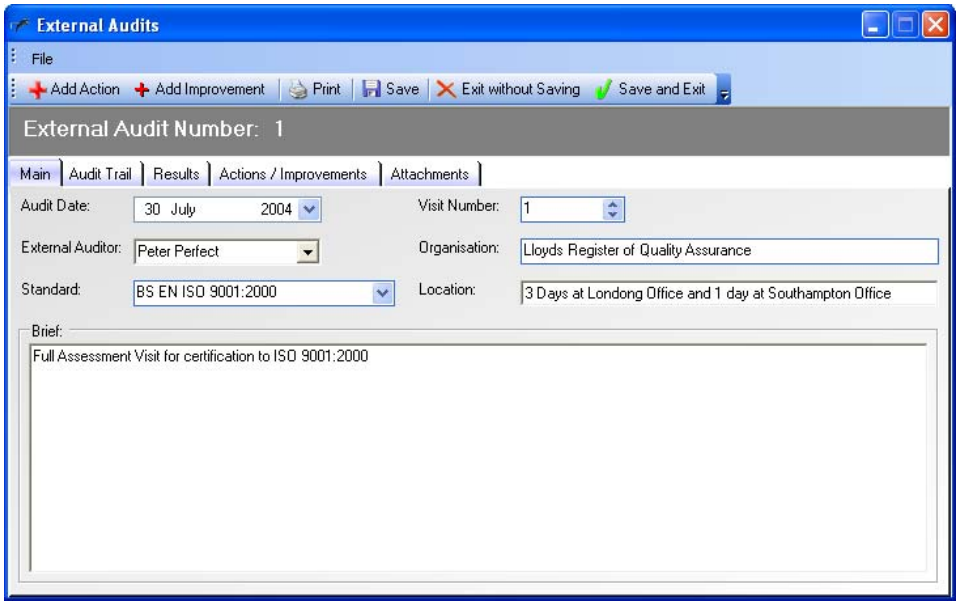
The functionality for these buttons is described in the "Attachment Tabs" section.

5.2.1.3. External Audit

This screen holds all the data relevant to an External Audit, including Actions, Improvements and any scanned and attached documents such as external reports and hand-written notes.

The toolbar buttons across the top work in exactly the same way that they do in all other records within the Data Centre.

Main Tab

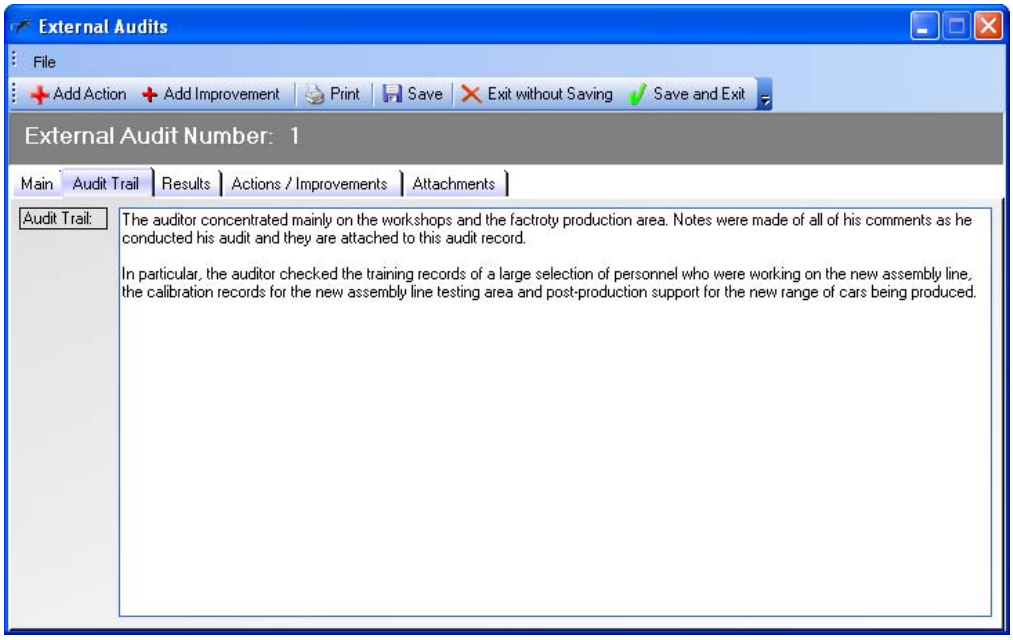


The first tab holds data about the audit including the auditor, the auditing organization, the audit or visit number, a brief description of the External Audit, the locations being audited and the audit date. The date is automatically selected as today's date, but it can be changed by clicking on the drop-down arrow and selecting a date from the pop-up calendar.

The Company Notes is a free text field where the Company Representative can add notes of any type, about anything to do with the audit. These notes can give rise to Actions or Improvements above and beyond what the Auditor noted.

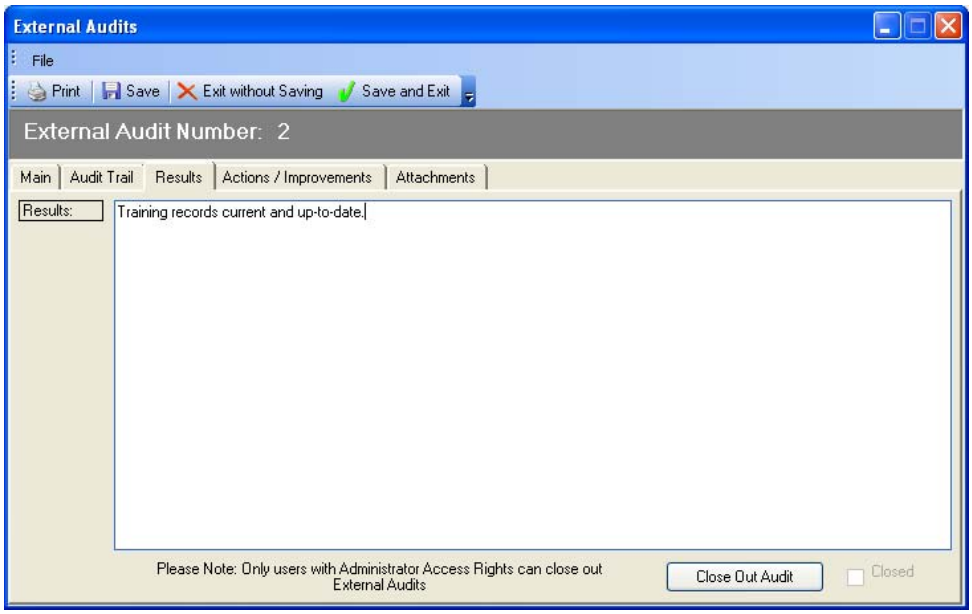
Audit Trail

The second tab is used to note all relevant data about how the audit was conducted, what areas were checked, people spoken to, escorts names, times, etc. Of particular note are any adverse comments that were made, not necessarily because they might end up as noncompliances, but because all areas of weakness should be checked thoroughly, even if eventually there is no case to answer.


External Audits
File
Add Action
Add Improvement
Print
Save
Exit without Saving
Save and Exit
External Audit Number: 1
Main
Audit Trail
Results
Actions / Improvements
Attachments
Audit Trail:
The auditor concentrated mainly on the workshops and the factroty production area. Notes were made of all of his comments as he conducted his audit and they are attached to this audit record.
In particular, the auditor checked the training records of a large selection of personnel who were working on the new assembly line, the calibration records for the new assembly line testing area and post-production support for the new range of cars being produced.

Results tab

The third tab is used for recording the summary of the results of the audit. This can also be accompanied by comments on the various items that appear in the auditor's report.

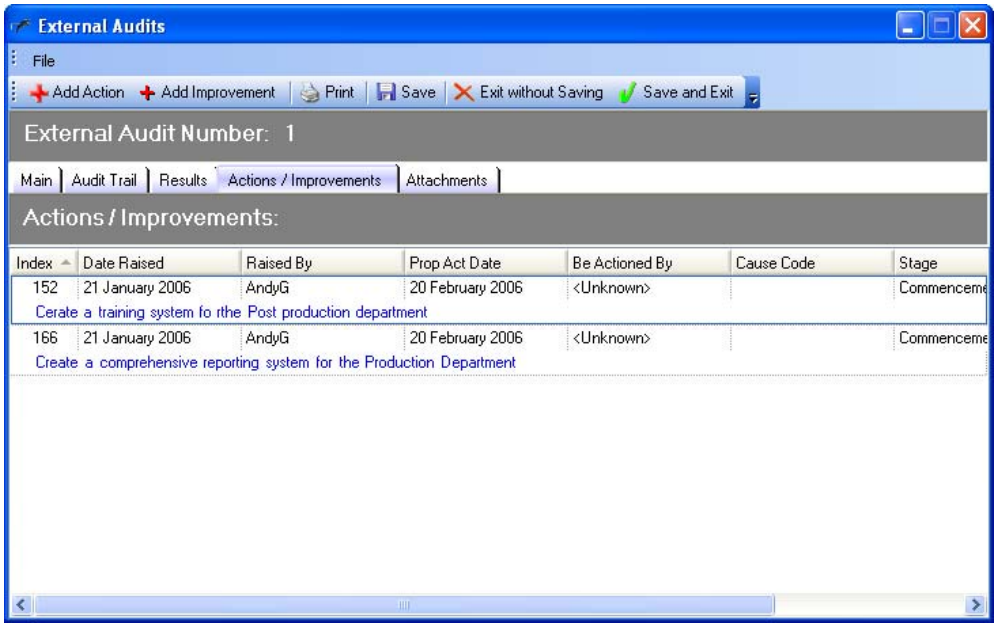


An external audit may be closed by an Administrator when satisfied that all required corrective and/or preventive action has been taken.

Actions/Improvements tab

The third tab holds any Actions and Improvements that are related to the audit. They are created by selecting the "Add Action" button or the "Add Improvement" button. The Actions only get added to the Actions/Improvements tab when they have been raised and saved.

The blue preview lines denote the Actions required in the Action and Improvement and are only shown if the Auto-Preview preference is set.



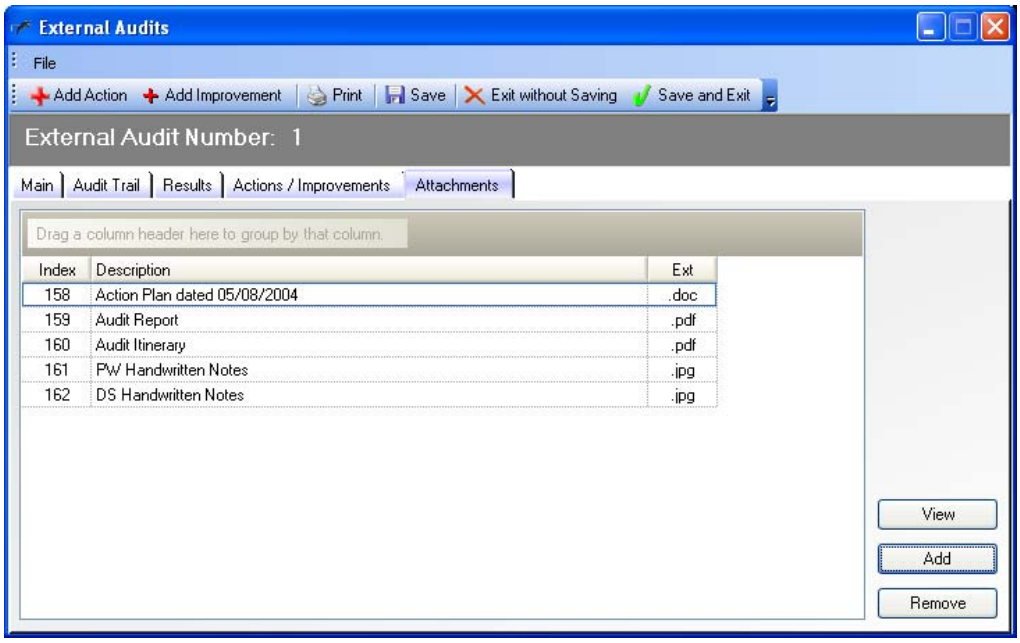
Any corrections, corrective actions, preventive actions or improvements that are flagged up as result of this audit should be raised from this tab. This will give full traceability between the actions and this audit.

Attachments Tab

The fifth tab is used to attach any documentary evidence that may be relevant to the audit. For example, you might comment that a certain document is in error and attach it to this tab for future viewing. The document will be changed and any evidence of the error will be lost. However, by attaching it to this tab, you preserve a copy of the document "as it is" for future reference.

You can also scan documents such as reports, handwritten notes, Certificates of Training, etc and they will become a permanent part of this Audit Record.

The functionality for these buttons is described in the "Attachment Tabs" section.

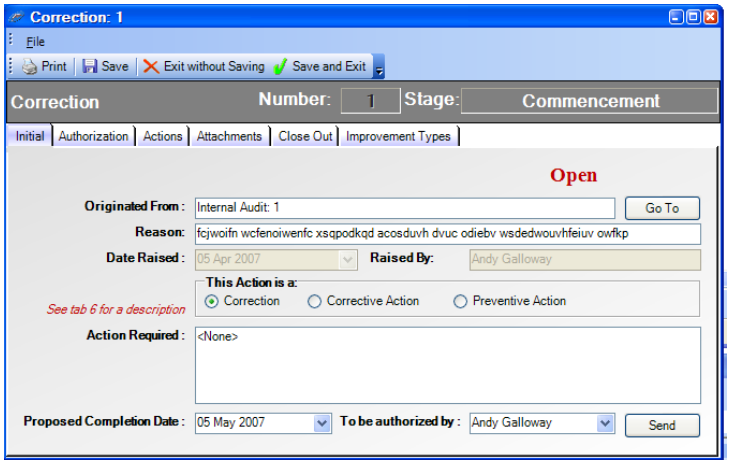


5.2.1.4. Actions and Improvements

The Actions and Improvements screen holds all the data relevant to a Correction, Preventive Action, Improvement or Corrective Action. (Definitions). The main difference between an Action and an Improvement is that an Action has a clearly defined need. It exists to rectify something that has gone wrong or may go wrong. An Improvement will be streamlining or enhancing a process that is working perfectly well - it can just be done better, quicker, cheaper, etc. The same form functionality has been used for both Actions and Improvements. The difference is that with an Action you can choose via radio buttons whether the action is a Correction, a Corrective Action or a Preventive Action. Certain reports rely on this information being accurate. Improvements do not give the option, they are just simply Improvements.

The buttons along the top of the Action or Improvement Form follow the standard functionality of all Dolphin Toolbars.

Initial Tab



Actions and Improvement Reports can be raised as a result of another function such as Internal Audits, Training Analysis, Personnel Reviews, Supplier Problems, External Audits, Actions or Improvements, Training Evaluation, Appraisals, Calibration, etc. They can also be raised by selecting "Add a Record" when viewing the list of Actions and Improvements in the Data Centre. There is one central point of reference for all Corrections, Corrective Actions, Preventive Actions and Improvements. They are controlled by the software coded into the Report. It follows the following routine.

When someone identifies an Action or Improvement, they raise an Action or Improvement Report. This Action or Improvement is automatically linked back to the record that caused the Action or Improvement to be raised i.e. the Audit or Calibration Record and the Action or Improvement number appears in that record.

The Stage of the Action/Improvement shows “Commencement” in the top right of the form.

Details of the originating function are also generated automatically and inserted in the “Originated from” box. You can also enter a more information into the “Reason” field. For example, “Internal Audit 27 - Documentation Control”, or “Calibration of Meter ABC123 on 27/05/2004”, or “Training Needs Analysis of Joe Bloggs on 25/05/2004”. The information in this box can be overwritten initially.

The “Go To” button takes you back to the originating record, whilst leaving this Action or Improvement Report open. (This allows the originator to make reference to the original problem as he/she is composing the Action or Improvement Report, and to toggle back and forth between the two.)

The date of the creation of the Action or Improvement Report is automatically entered in the “Date Raised” box. It is not possible to change this information.

The name of the person logged in to Dolphin at that time is entered into the “Raised by” box. It is not possible to change this information.

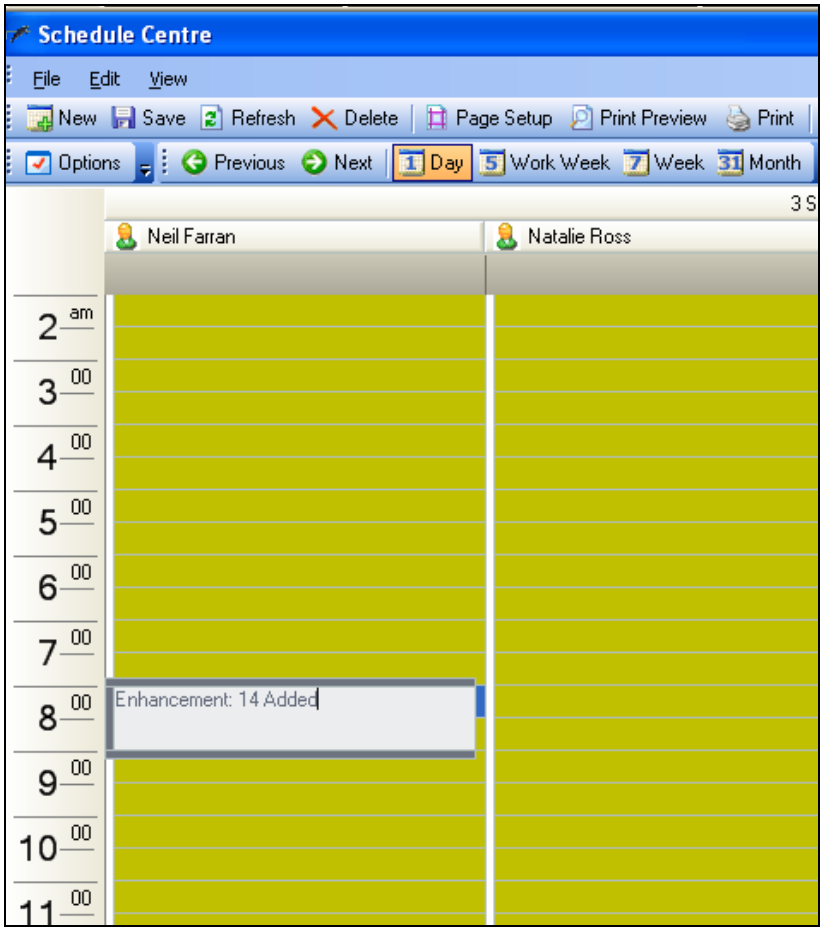
The originator completes the “Action required” box. If this is an Action, the Originator must also decide whether this is a “Correction”, “Corrective Action” or “Preventive Action”. Later report

functions rely on this selection being made diligently. For a Definition of these terms, see tab 5 of the Actions or Improvements.

The originator then identifies the date that he feels would be an acceptable completion date and enters it in to the “Proposed Completion Date” box. The default is one calendar month from the date of raising this report. He then identifies who the report should be forwarded to for action and this is entered into the “To be actioned by” box from the drop down list of “Authorizers” (“Authorizer” attributes are allocated to the Users in the User Centre).

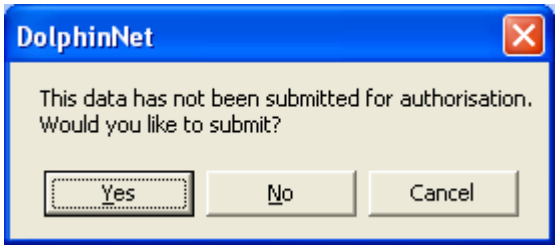
Pressing the “Send” button causes four things to happen. Firstly, it locks all of the existing information except the “To be actioned by” box which is locked to everyone except the originator. Secondly, it sends an email asking the Authorizer to action the Action/Improvement.

Thirdly two entries are added to the Scheduler, one showing that the Improvement was raised and one showing the Proposed Completion Date. Fourthly, the Stage of the Action/Improvement is updated to show “Awaiting Authorization” in the top right of the form.



If the Improvement has been sent to the wrong Authorizer or if he is away for a period of time, the Originator can open the Improvement and allocate another Authorizer from the drop down list. This would post the Improvement Report again once he presses the “Send” button.

If the Originator selects “Save and exit” before sending the action / improvement to an authorizer to approve the action, the following message appears:

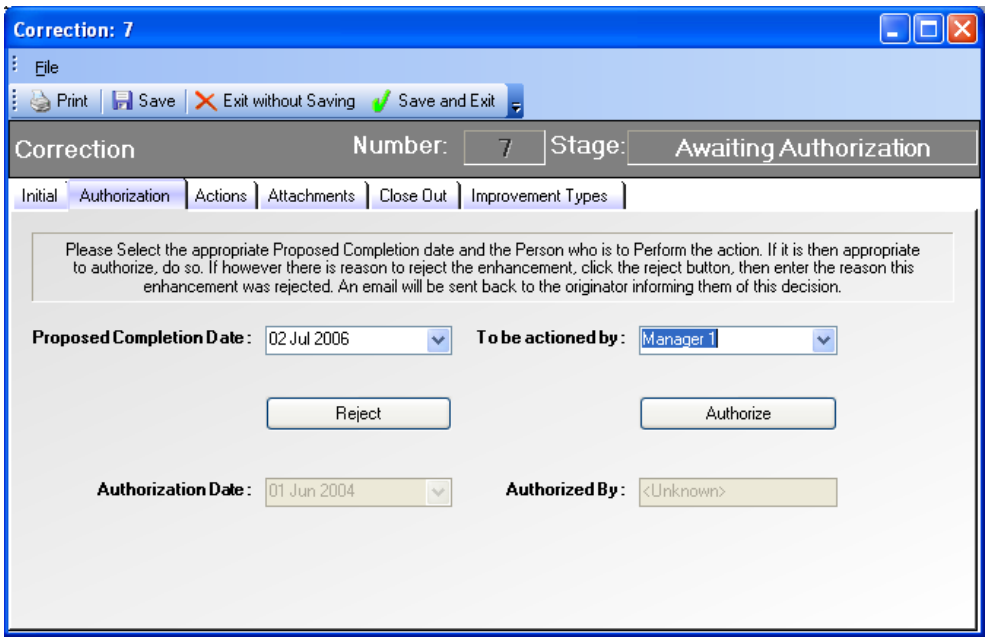


Selecting one of three options will have the following effect:

- Yes - Submit to Authorizer then Exit. This will send and then save the action / improvement
- No - Exit without submitting (this is not recommended)
- Cancel - Do nothing and stay within the action / improvement box (this will allow the Originator to select the “submit” button for approval).

If the originator clicks “Exit without saving” at any point, Dolphin will generate a prompt. The message window states that any unsaved changes will be lost.

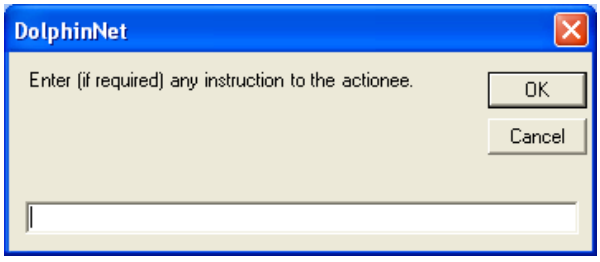
Authorization Tab



When someone other than the Authorizer opens the Action or Improvement, no date appears in the "Authorization Date" box and all fields are locked. However, when the Authorizer opens the Improvement the system date is entered into the "Authorized Date" box automatically. It is not possible to change this date. The Authorizer's name is entered into the "Authorized by" box as the person logged into Dolphin. The Proposed Completion Date entered by the Originator is automatically copied to the second "Proposed Completion Date" box. This date can be altered by the Authorizer or the Originator. If there is no Actionee identified in the "To be actioned by" box, the Authorizer must provide one from the drop down list of all Dolphin Users.

If the Authorizer feels he cannot authorize this Action/Improvement as it is, he selects the "Rejected" button. In this case, the Authorizer must provide a reason for rejecting which gets added to an e-mail and sent back to the Originator. The Originator can then take appropriate steps to amend the action or send it to a different Authorizer. The Rejected e-mail is not delete-able. Rejecting an Action/Improvement causes the Stage of the Action/Improvement to be updated to show "Rejected" in the top right of the form.

Pressing the "Authorize" button causes five things to happen. Firstly, it locks all of the existing information. Secondly, it sends an email asking the person identified in the "To be actioned by" box (the Actionee) to carry out the specified Action/Improvement. Thirdly it updates the Scheduler to show the amended Proposed Completion Date, if applicable. Fourthly, the Stage of the Action/Improvement is updated to show "Authorized Awaiting Action" in the top right of the form. Finally, it brings up a new window, as shown below:

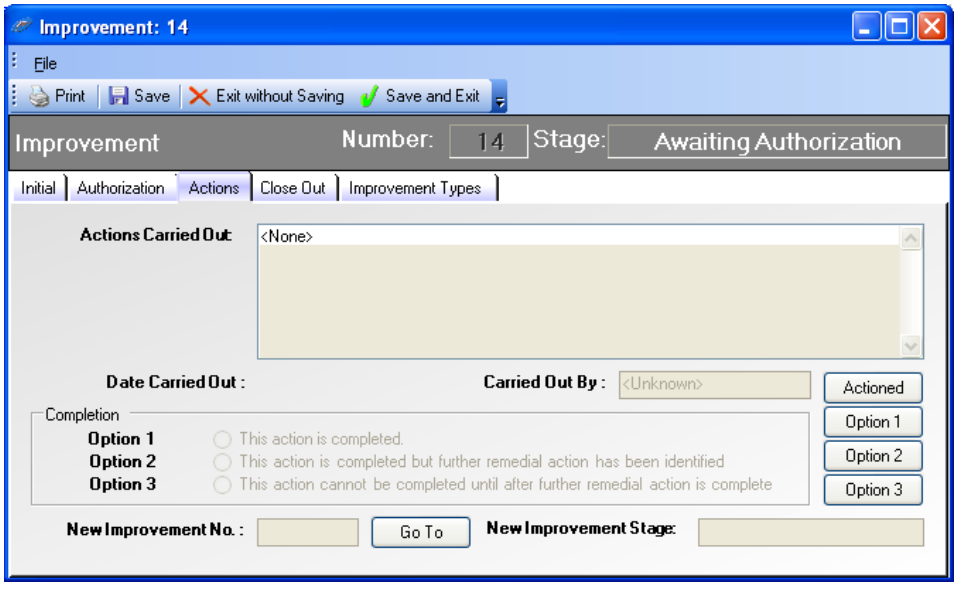


The Authorizer can add any further instructions for the person who will be actioning the proposed improvement. This may be important if the reason and description for the action are brief and the task is complex.

When the Authorizer clicks ‘ok’, a prompt appears to advise the Authorizer that the appointment has been created.

The Authorizer should then select ‘save and exit’ to close the record. A message prompt will appear to confirm that the data is saved.

Actions Tab



When the Actionee accesses the Action/Improvement Form, he or she can update the Actions Tab with the actions that they carried out. All other Users cannot change any of the information in the Actions Tab. Once the Actionee has completed the action, he gives a brief summary of what he did in the “Action Carried out” box and presses the “Actioned” button. The date that this information is added to the “Action Carried out” box is automatically entered into the “Date Carried Out” box and

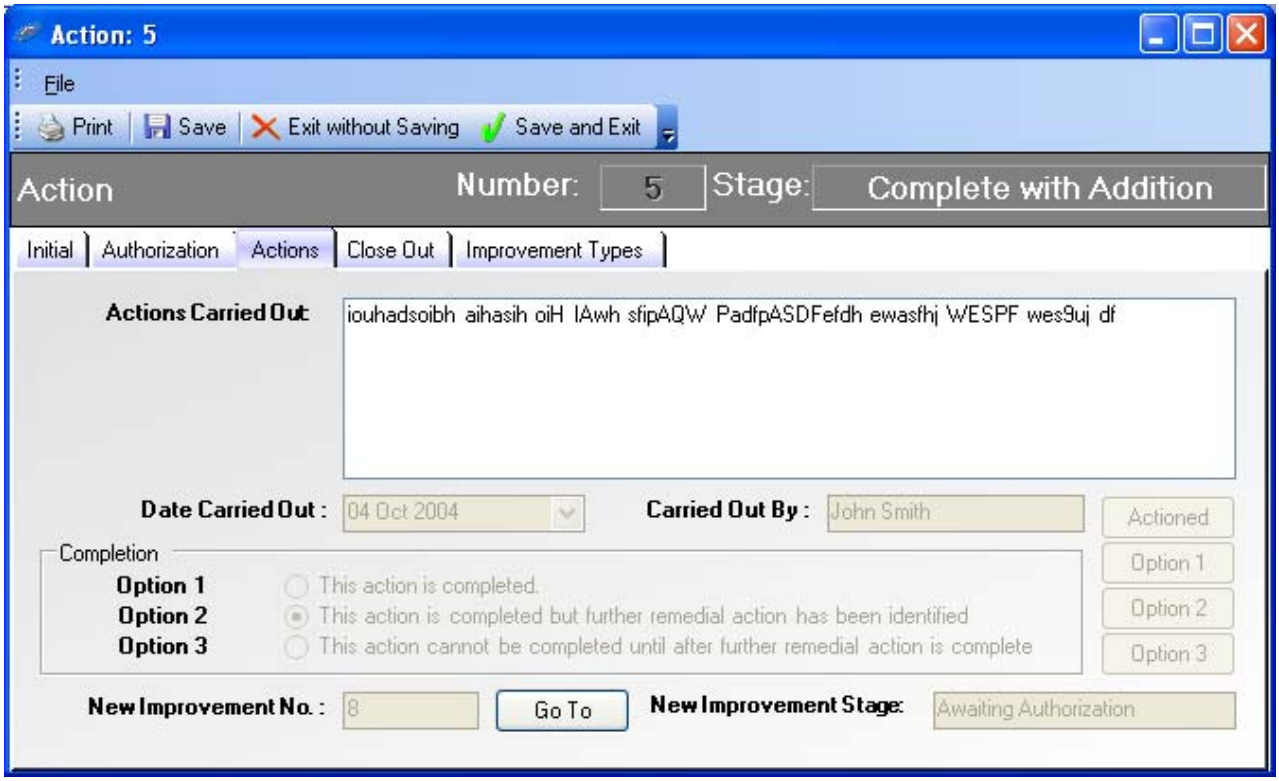
the name of the person logged in to Dolphin at that time is entered into the “Carried out by” box. It is possible for the Actionee to change this information at this stage.

The Actionee then selects option 1, 2 or 3 by pressing the relevant button. The following happens for each of the three Options

Selecting “Option 1: This action is completed” is chosen by pressing the “Option 1” button. This authorization causes four things to happen.

Firstly, it locks all of the existing information. Secondly, it sends an email to the Originator identified in the “Raised by” box with a link attached asking them to review and close out the Action/Improvement. Thirdly it updates the Scheduler to show the Action Date. Fourthly, the Stage of the Action/Improvement is updated to show “Complete” in the top right of the form.

Selecting; “Option 2: This action is complete but further Improvement has been identified” is by pressing the “Option 2” button.

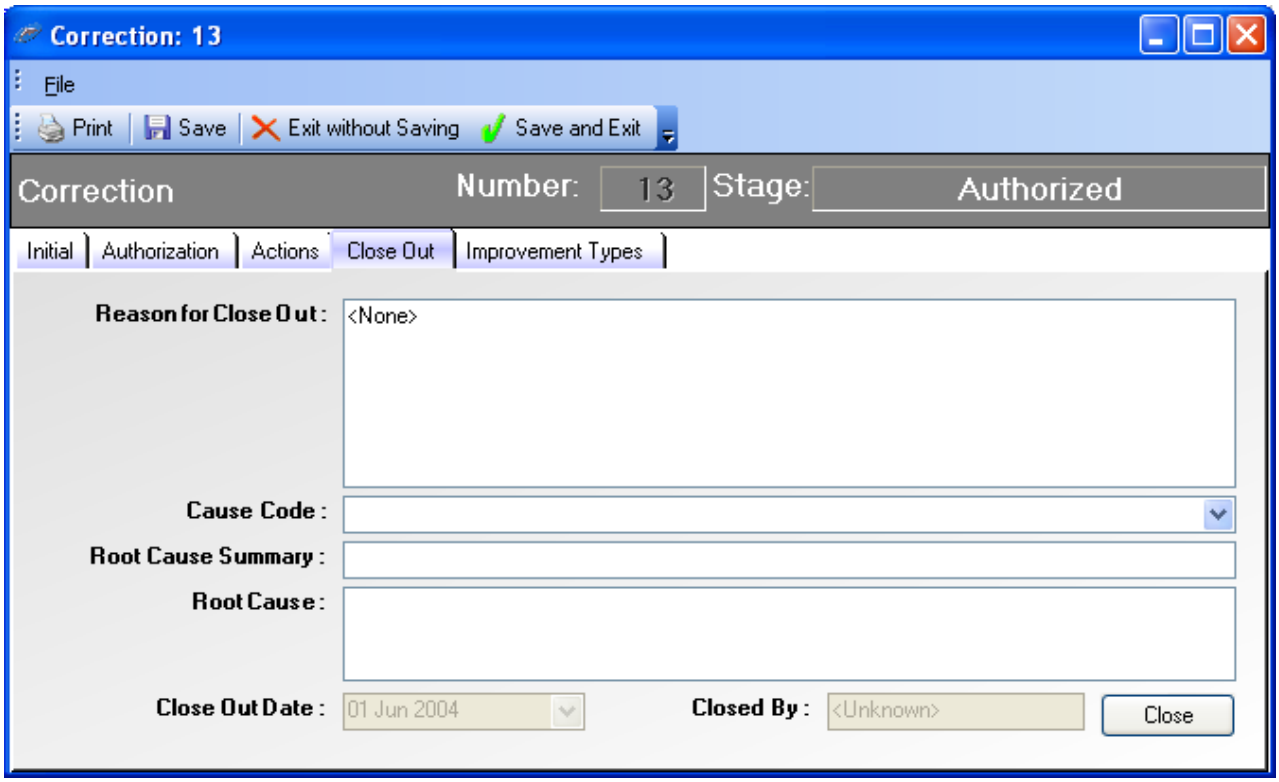


This authorization causes five things to happen. Firstly, it locks all of the existing information. Secondly, it sends and email to the Originator identified in the “Raised by” box asking them to review and close out the Action/Improvement. Thirdly, it initiates a further Improvement Report (quoting this Improvement Report as the originating function and the Actionee for this Improvement now becomes the Originator for the subsequent one). Fourthly, the Scheduler is updated to show the Action Date (Note that part of the originating function for the new Improvement is to feed back the new Action/Improvement number to this Improvement). Fifthly, the Stage of the Action/Improvement is updated to show “Complete with Addition” in the top right of the form.

Selecting “Option 3: This action cannot be completed until after further Improvement has been completed” is selected by pressing the “Option 3” button. This authorization causes five things to occur. Firstly, it locks all of the existing information. Secondly, it initiates a further Action/Improvement (quoting this Action or Improvement as the originating function and the Actionee for this Action or Improvement now becomes the Originator for the subsequent one). Thirdly, an e-mail is sent to the Originator explaining that completion of this Action/Improvement may be delayed due to the fact that a further Action or Improvement has been identified. Fourthly, the Scheduler is updated to suspend the reporting on the Proposed Completion Date until after the subsequent Action/Improvement has been closed. (Note that part of the originating function for the new Action or Improvement is to feed back the new Action/Improvement number to this Action/Improvement) Fifthly, the Stage of the Action/Improvement is updated to show “Incomplete with Addition” in the top right of the form.

Pressing the “Go To” button allows the Actionee to go to the subsequent Action/Improvement (This would be to allow the Actionee to make reference to the original problem as he/she is composing the next Action or Improvement Report and to toggle back and forth between the two.)

Close Out Tab



Once the Originator receives back confirmation that the required action has been completed, he carries out investigations to satisfy himself that the original problem has been rectified. He adds relevant information to the “Reason for Close Out” box and presses the “Close” button. The date that this information is added to the “Reason for Close Out” box is entered into the “Close Out Date” box and the name of the person logged in to Dolphin at that time is entered into the “Closed by” box. It is possible for the Originator to change this information at this stage.

Pressing the “Close” button causes four things to happen. Firstly, all fields are locked. Secondly, Scheduler is updated to show the “Close Date” and all reporting on this Action/Improvement is suspended. If necessary, reporting on a prior Action or Improvement is now reinstated. Thirdly, the originating function is updated with the “Close Date” and a tick in the box to show that it is completed, if applicable. Fourthly, the Stage of the Action/Improvement is updated to show “Closed” in the top right of the form.

Improvements Type Tab

Definitions for Correction, Corrective Action, Preventive Action and Improvement are found on the fifth tab of the Action or Improvement form. The information appearing in this tab is read from the “DD - Actions.doc” file found in the Docs subfolder. This file can be edited using the IMS Centre.

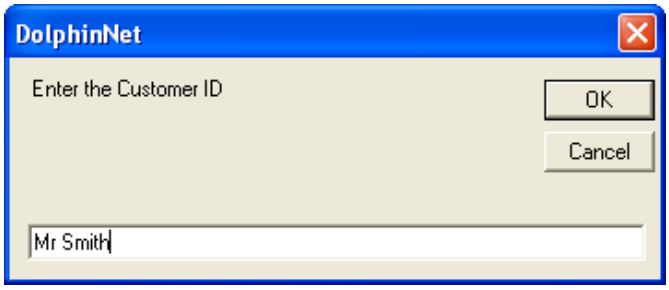
5.2.1.5. Customers

This screen holds all the data relevant to a Customer including free text notes and Customer care issues such as complaints and customer satisfaction data.

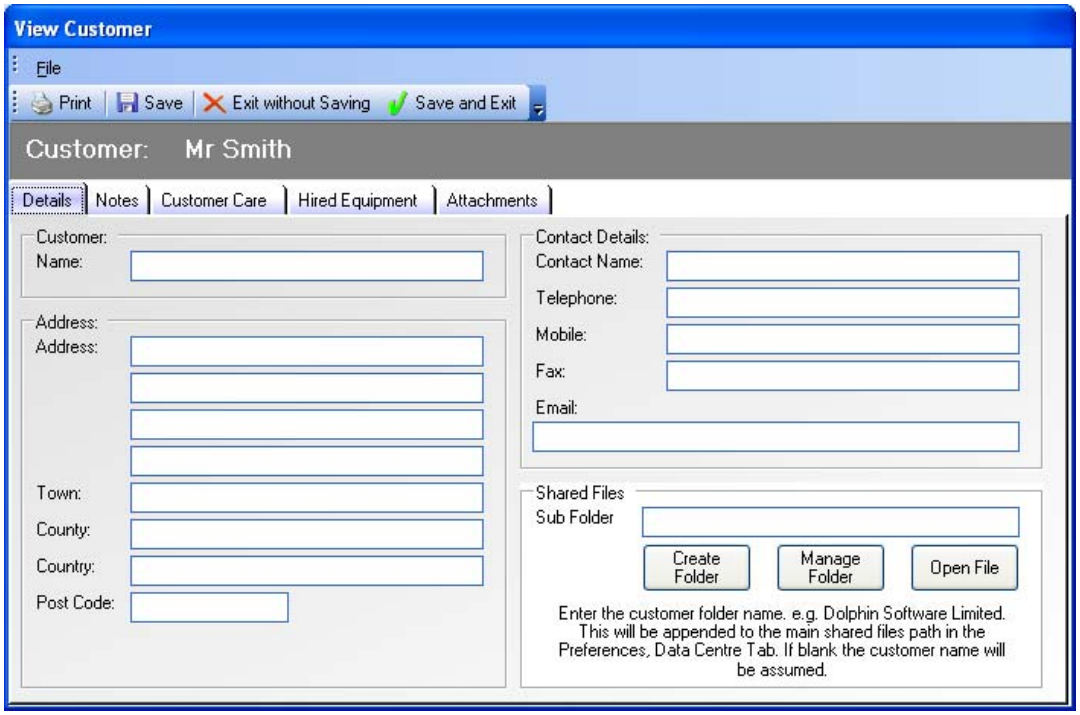
The toolbar buttons across the top work in exactly the same way that they do in all other records within the Data Centre.

Customer Tab

To add a new Customer Record, select the list of Customers in the data Centre and click on the "Add" button. The Customer ID must be input first, and then press the "OK" button. Make the Customer ID something that relates to their business with you - their Sage Customer Account, Their initial letter with some numbers, etc.

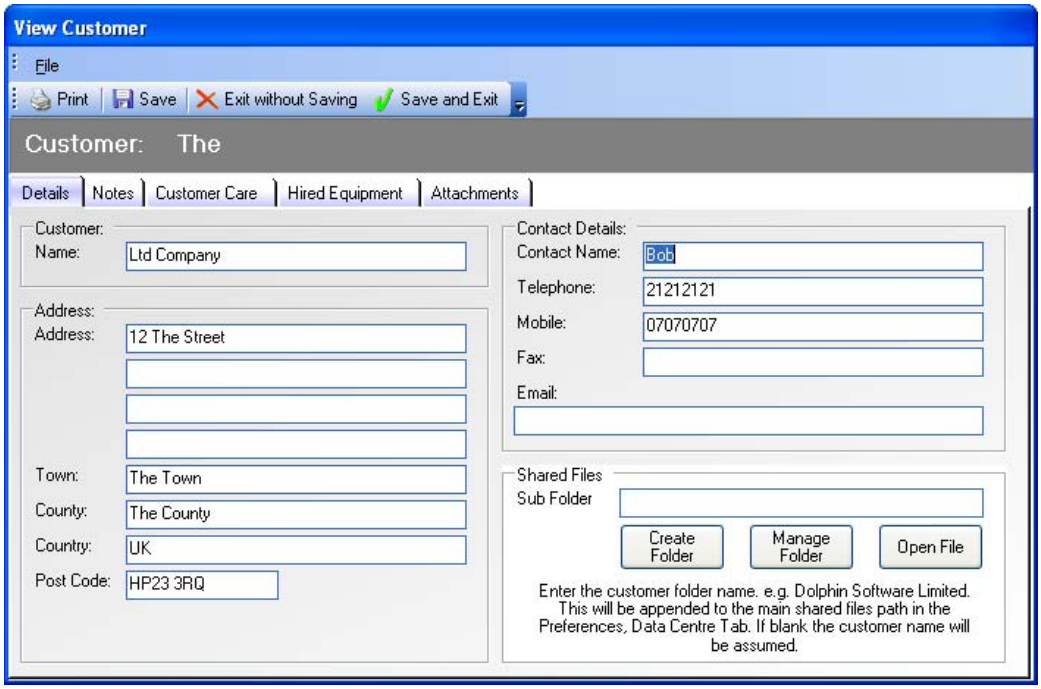


A blank Customer Record is now presented and it should be filled out as completely as possible. Clicking on "Cancel" returns the User to the List of Customers with no additional entries made.



If there are other IT systems within the company, which hold customer information it may be necessary to link the data to Dolphin, to prevent duplication of information. To make use of information stored in another location, the name of the subfolder where the data is held should be added in the "Shared Files" and "subfolder" box, as shown below.

Additionally, it is important to ensure the correct system preferences have been set up. This is achieved by returning to the main page and selecting "edit" and then "preferences". The data centre tab is selected and the file path added. Refer to the preferences section.

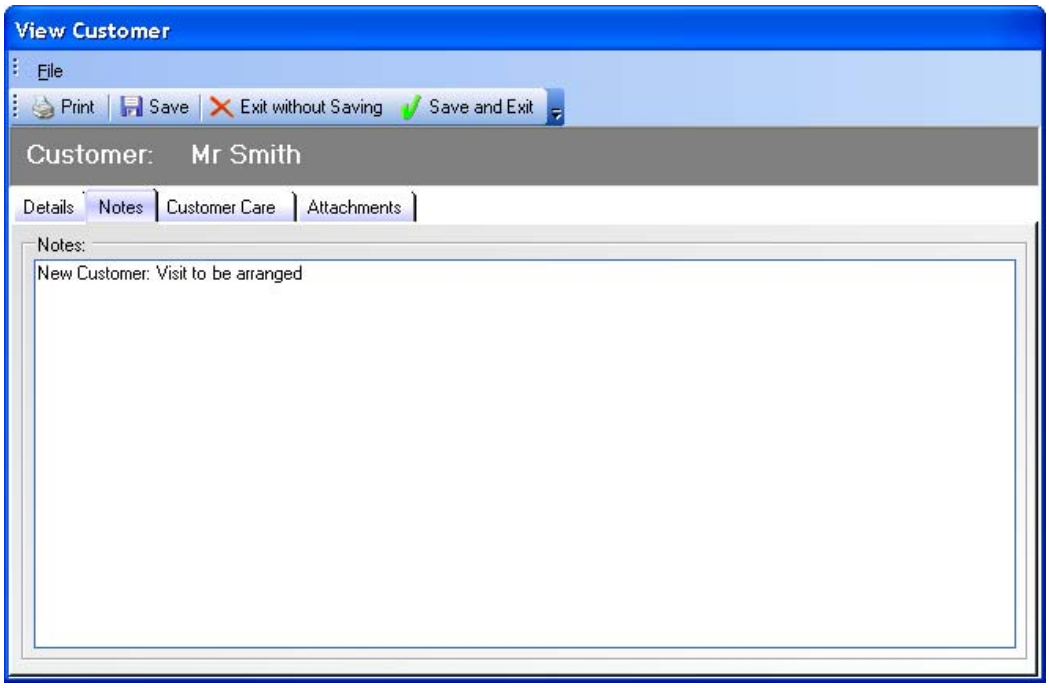


Once the relevant information has been input, there are three buttons below the name of the subfolder. This gives 3 further options:

- "Create Folder" generates the folder on the combined path, or;
- "Manage Folder" opens it up in windows explorer, or;
- "Open File" opens up an open file dialog, based at the combined path.

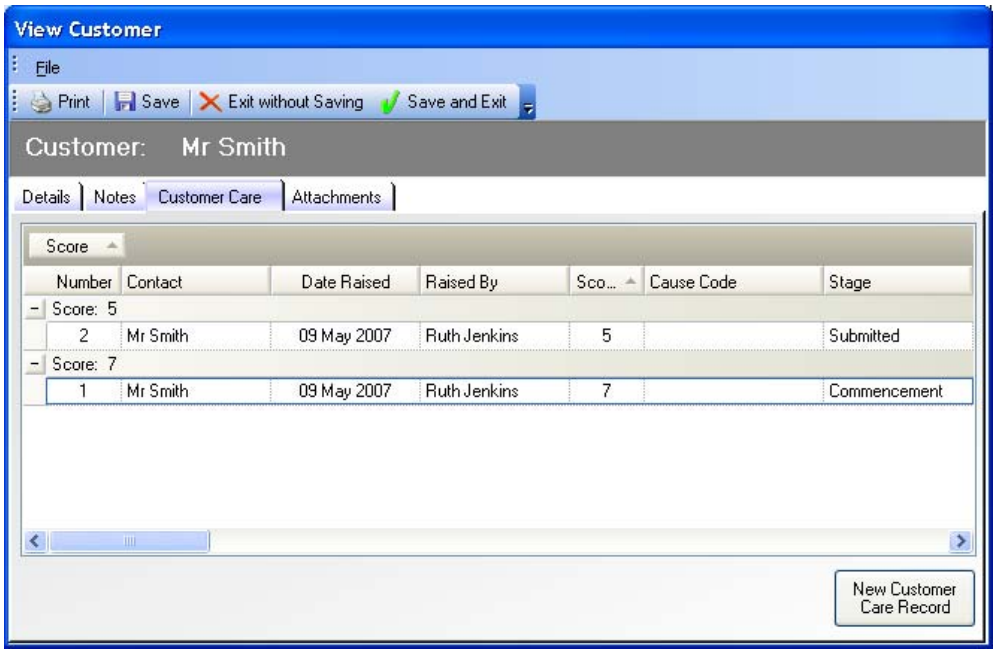
When completed, click on the "Save and Exit" button and the data will be saved to the Customer Database. Clicking on "Exit without Saving" returns the User to the List of Customers with no additional entries made.

Notes Tab



This is an area for free text and any and all useful information should be added to these notes.

Customer Care

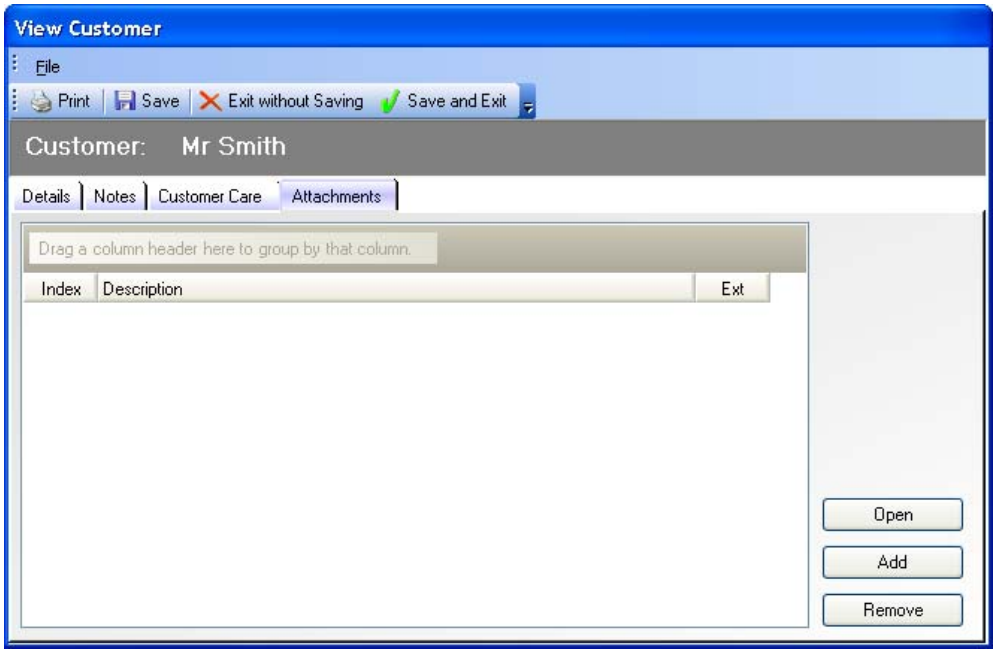


Customer care issues that have been raised by a customer are listed under this tab.

One way of raising a Customer Care issue is to click on the “New Customer Care Record” under this tab, see above. The blue preview lines show the Brief description from the Customer care issues and are only shown if the Auto-Preview preference is set. Dragging the column headers up to the grey bar allows sorting and grouping within the database, as described in the Group function for the Toolbar.

Attachments

This tab is used to hold any relevant documentary information relating to the customer:



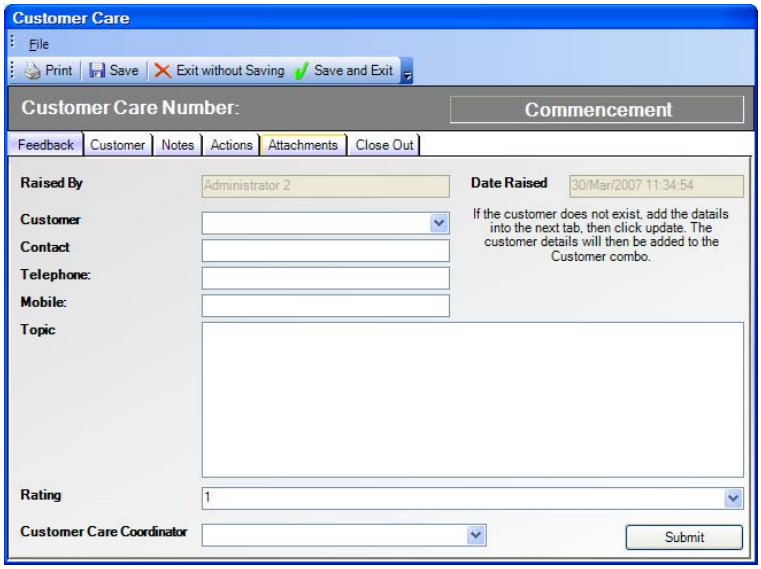
5.2.1.6. Customer Care

The Customer Care Table holds all instances of Customer Care issues. As with other such tables, the “Preview” information can be switched off or on.

Select a record in the table and double-click it or press the View button to open up a single record in a Customer Form. Within this form, the toolbar buttons across the top work in exactly the same way that they do in all other records within the Data Centre.

Note: If a new record is created the Contact Name and Telephone Number must be input and a description of the topic, to enable the User to save the record.

Feedback Tab



Once completed click the submit button which generates the Acknowledge by, Action by and Close by dates which then appear in the notes section. If the Customer Care Record is saved without submission to the CC Controller Dolphin will automatically submit it.

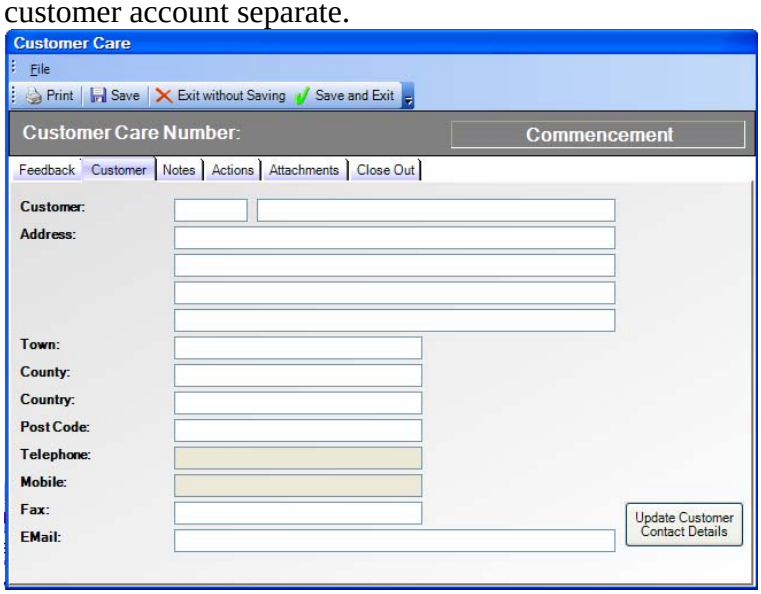
When a user submits a new Customer Care record, an email is sent to the authorizer, informing him/her that this record is awaiting authorization; the email contains a link to the specific Customer Care record.

Customer Tab

As soon as the Customer is selected on the “Customer” tab, this tab is populated with the recorded customer details. This can be amended if required. By clicking on the “Update Customer Contact

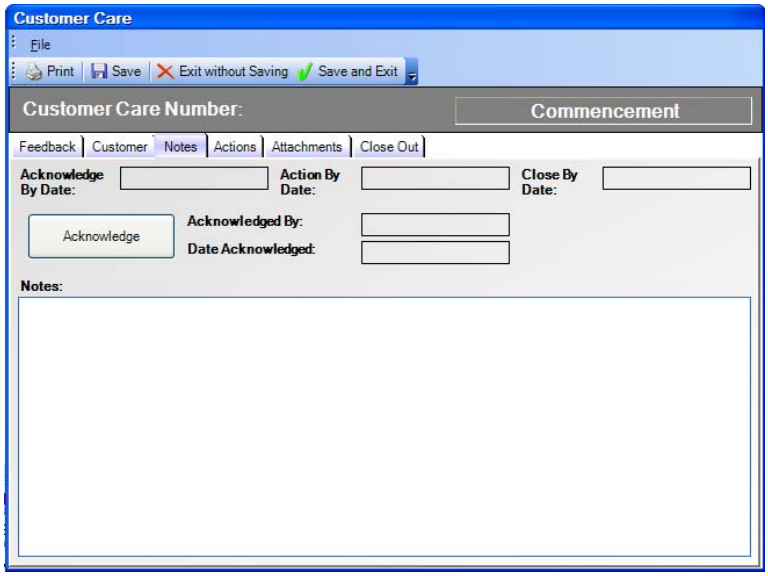
Details" button, the information stored in the Customer database is updated to this information. The Update Customer Records button checks to see if the customer exists and if not offers the user the option of adding the new customer automatically to the customer database. It is always worth checking the Customer details with the customer at this stage.

If the Customer details are held within Dolphin raising a Customer Care issue will automatically associate the issue with the relevant record once selected. If the Customer Records are held in a separate database it is possible to use Dolphin only to log Customer Care issues raised and keep the customer account separate.



Notes Tab

The notes tab is to allow you to write down what the investigation was and why we are raising actions

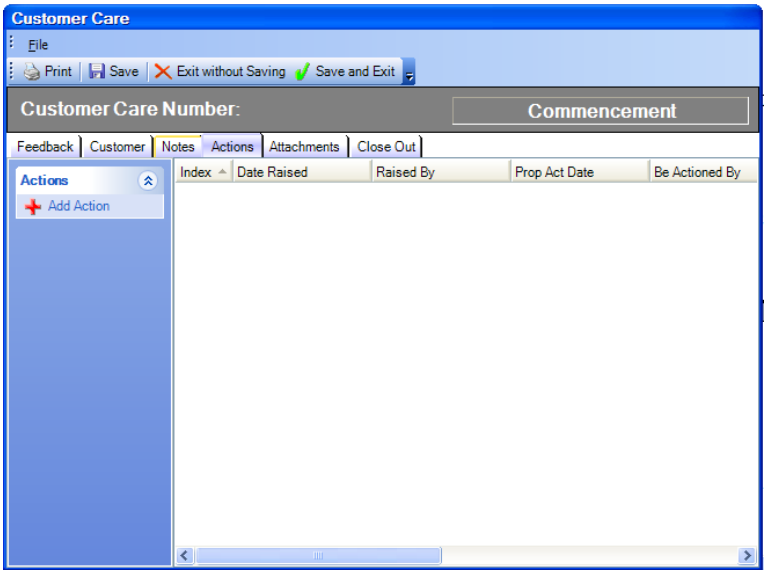


Actions Tab

This tab holds any Actions and Improvements that are related to resolving this Customer Care issue. They are created by selecting the "Add Action" button. The Actions only get added to the Actions tab when they have been raised and saved.

The Customer care record can only be closed if all Preventive Action & Improvements have been closed.

The blue preview lines denote the Actions required in the Action and Improvement and are only shown if the Auto-Preview preference is set.

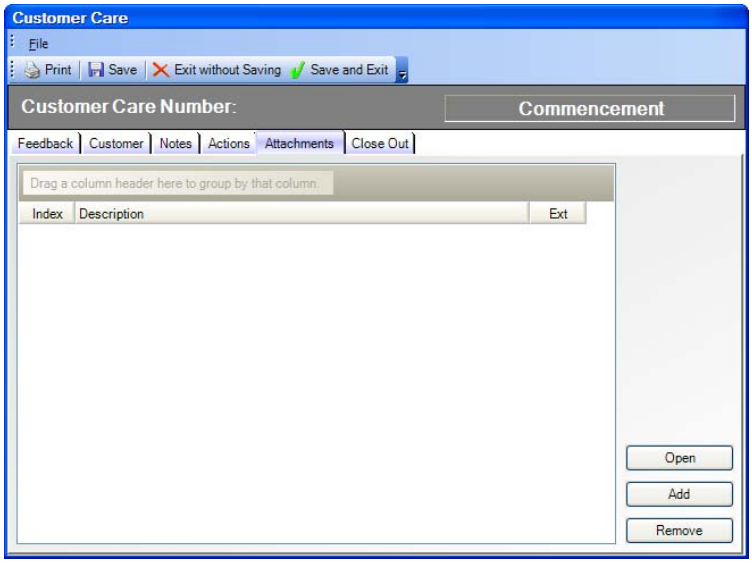


Attachments Tab

This tab is used to attach any documentary evidence that may be relevant to the incident. For example, you might comment that a certain document is in error and attach it to this tab for future viewing. By attaching the document to this tab you preserve a copy of the document “as it is” for future reference.

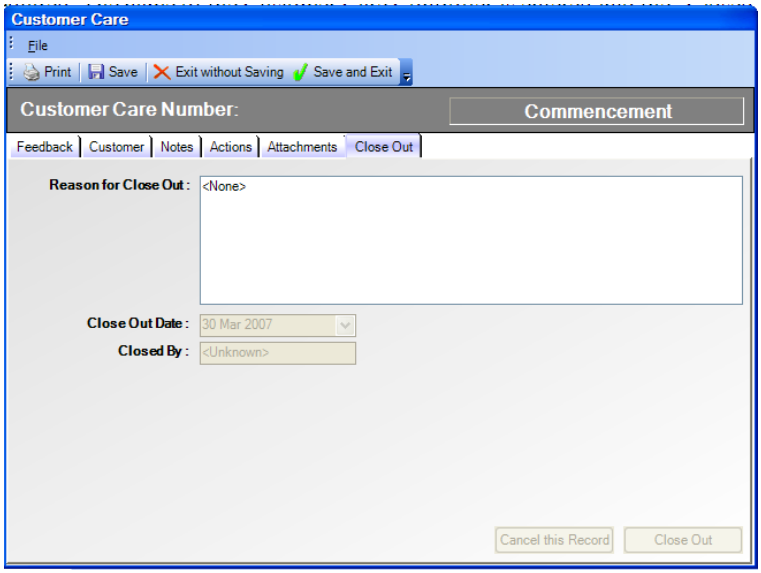
You can also scan documents such as reports, handwritten notes, Certificates of Training, a letter of complaint sent in by a Customer, etc and they will become a permanent part of this Customer Care Record.

The functionality for these buttons is described in the “Attachment Tabs” section.



Close Out

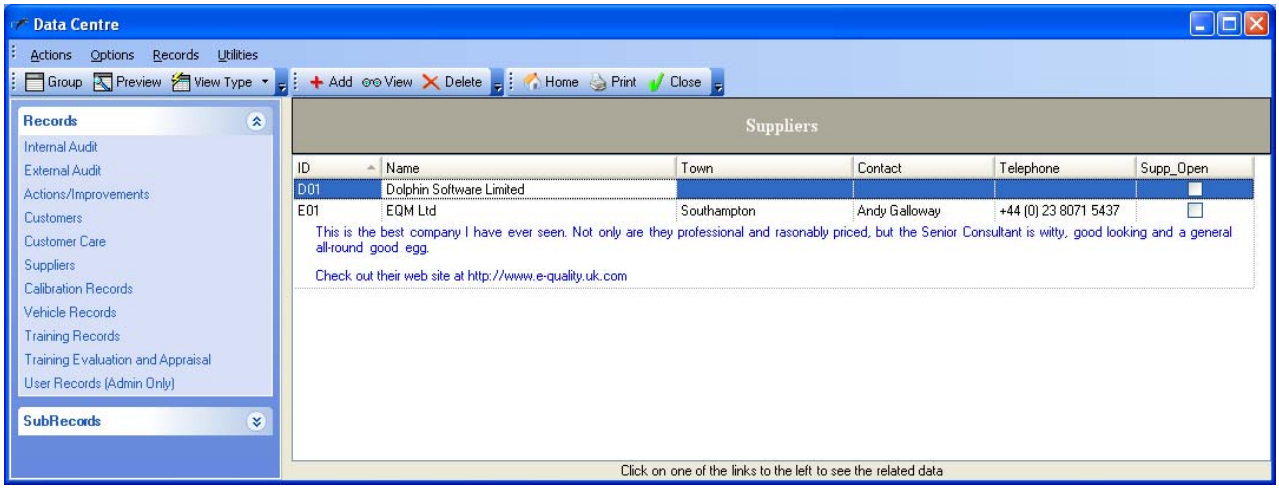
The close out tab is a free text box that allows you to record what was done, whether the customer was happy eventually, etc. The close out date is automatically entered as the system date but can be changed if required. The name of the Customer Care Controller is entered into the “Closed by” box automatically.



Pressing the “Cancel this Record” button deletes the record completely leaving no trace of the incident. The only person who can cancel a Customer Care issue is the Customer Care Controller as specified in the Preferences Section.

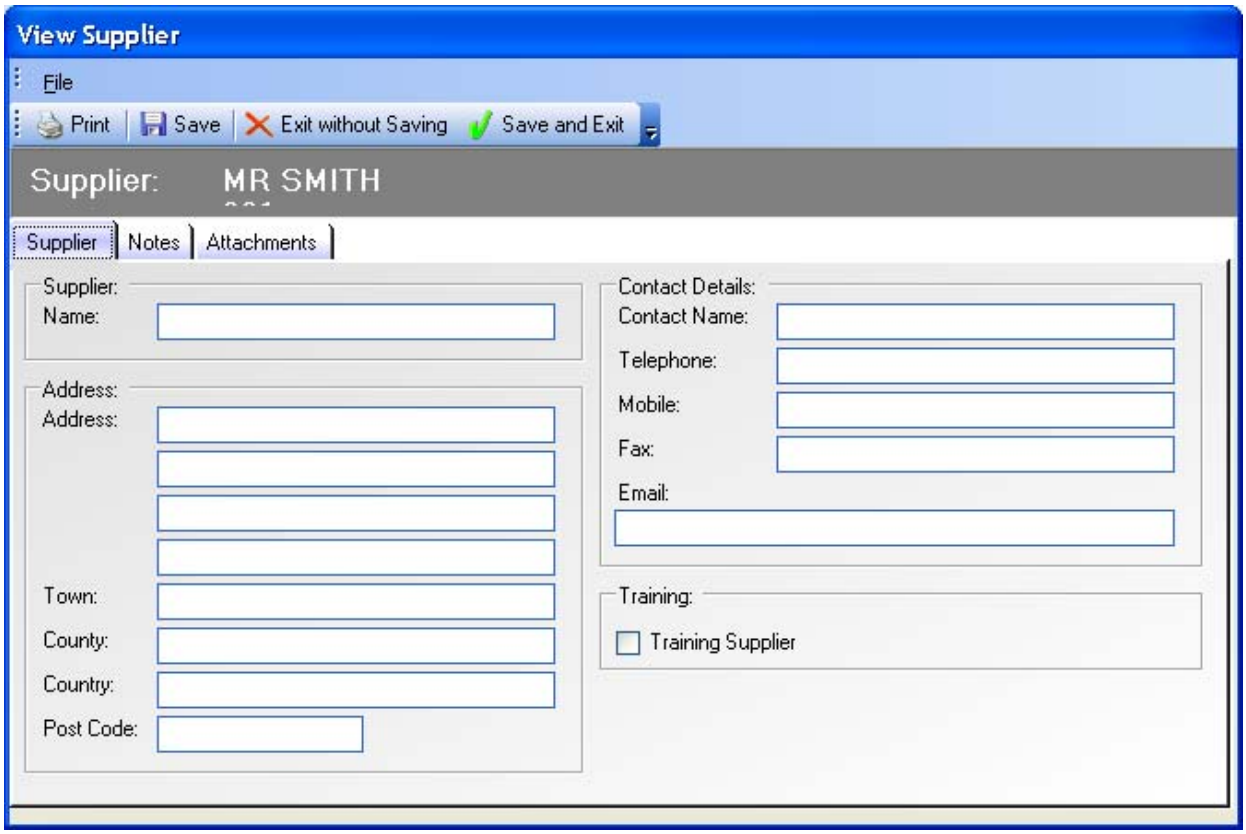
Pressing the “Close Out” button causes the record to be locked and the incident marked as closed in all records. However, there may still be Actions outstanding at this time. The only person who can Close Out a Customer Care issue is the Customer Care Controller as specified in the Preferences Section

5.2.1.7. Suppliers


Data Centre
Actions Options Records Utilities
Group Preview View Type
Add View Delete
Home Print Close
Records
Internal Audit
External Audit
Actions/Improvements
Customers
Customer Care
Suppliers
Calibration Records
Vehicle Records
Training Records
Training Evaluation and Appraisal
User Records (Admin Only)
SubRecords
Suppliers
ID Name Town Contact Telephone Supp_Open
D01 Dolphin Software Limited
E01 EQM Ltd Southampton Andy Galloway +44 (0) 23 8071 5437
This is the best company I have ever seen. Not only are they professional and rasonably priced, but the Senior Consultant is witty, good looking and a general all-round good egg.
Check out their web site at http://www.e-quality.uk.com
Click on one of the links to the left to see the related data

The Suppliers table holds information about all suppliers. Double-clicking a list item or selecting it and pressing the “View” button opens a single Supplier Record. Within this form, the toolbar buttons across the top work in exactly the same way that they do in all other records within the Data Centre.

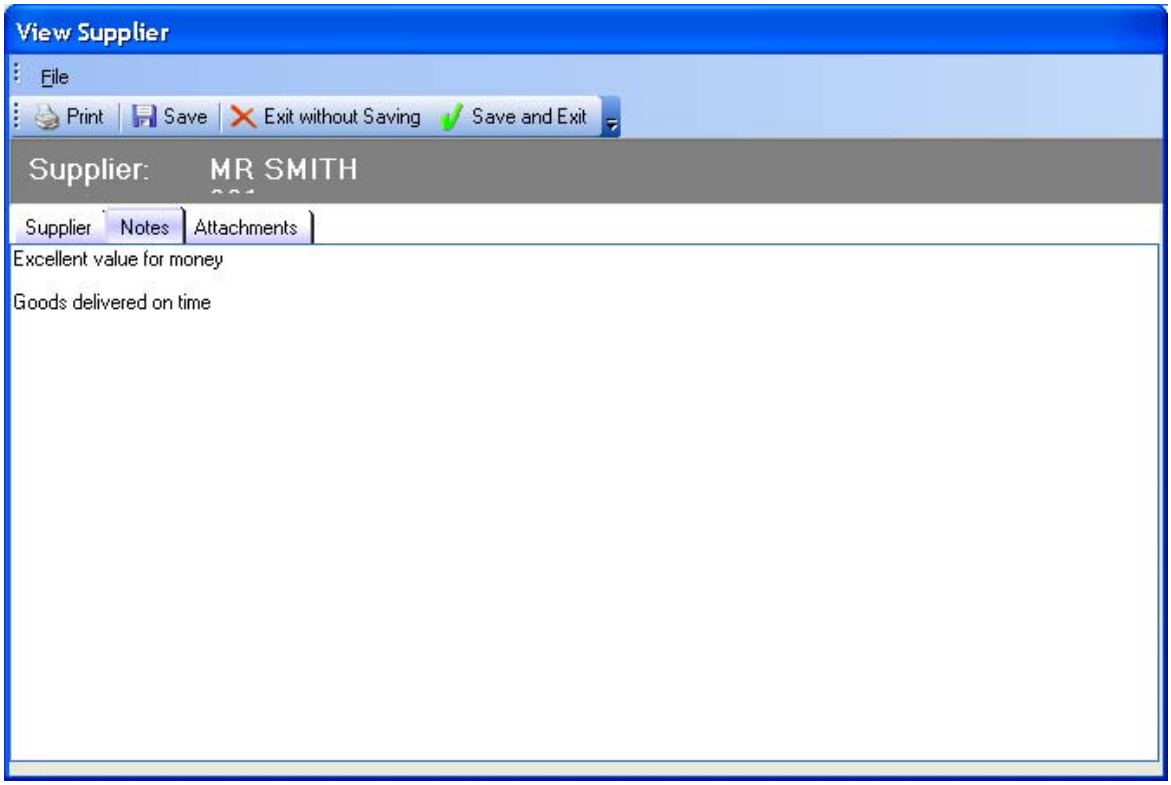
Supplier Tab



The Supplier screen holds all the data relevant to a particular Supplier.

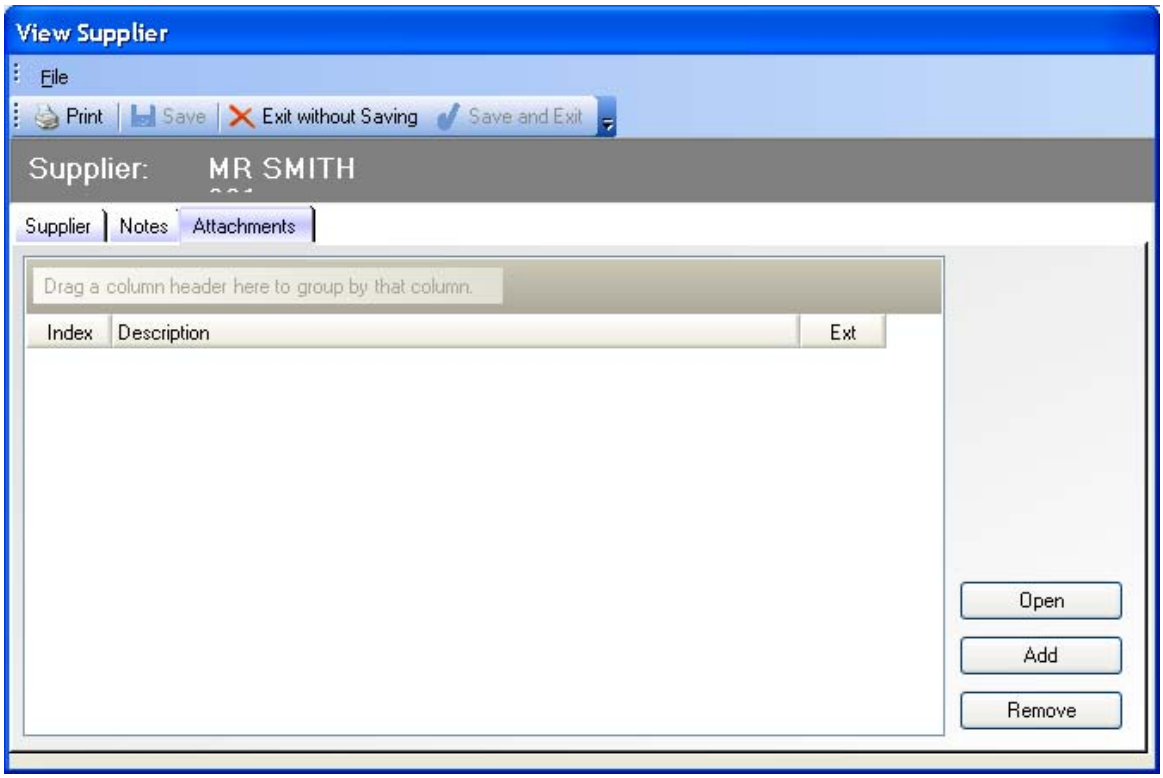
Notes Tab

This tab is used to record any relevant details about the Supplier, e.g. reason for choice, previous experience of Supplier, i.e. reliability, cost, etc.



Attachments Tab

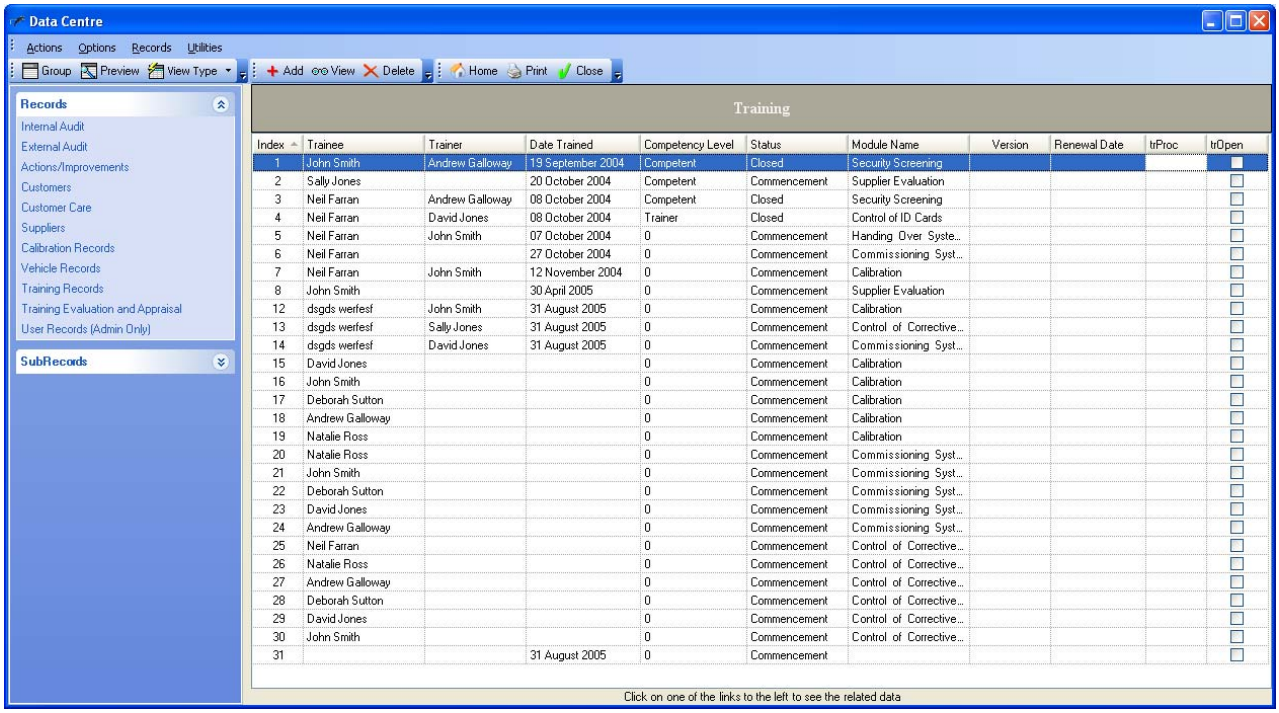
This tab is used to hold any relevant documentary information relating to the Supplier listed:



The functionality for these buttons is described in the "Attachment Tabs" section.

5.2.1.8. Training Records

The Training System is set up initially within the Subrecords and the User Centre. The training records screen holds the course details for a single individual attending a single course. The details held are shown on the screen below.

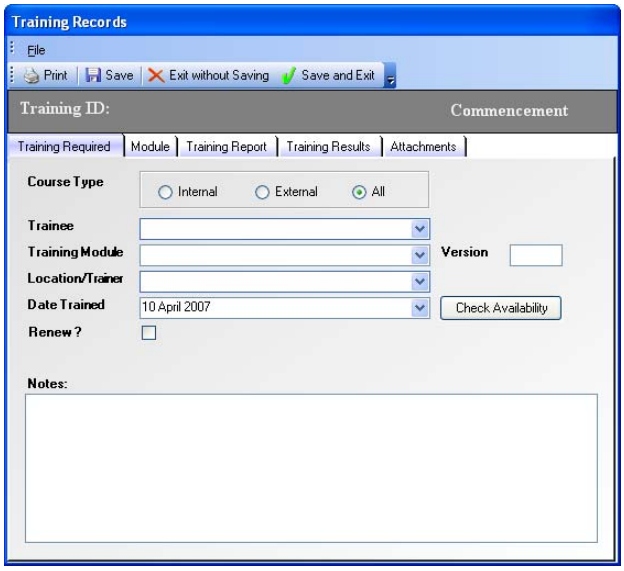

Data Centre
Actions Options Records Utilities
Group Preview View Type Add View Delete Home Print Close
Records
Internal Audit
External Audit
Actions/Improvements
Customers
Customer Care
Suppliers
Calibration Records
Vehicle Records
Training Records
Training Evaluation and Appraisal
User Records (Admin Only)
SubRecords
Training
Index Trainee Trainer Date Trained Competency Level Status Module Name Version Renewal Date trProc trOpen
1 John Smith Andrew Galloway 19 September 2004 Competent Closed Security Screening
2 Sally Jones 20 October 2004 Competent Commencement Supplier Evaluation
3 Neil Farran Andrew Galloway 08 October 2004 Competent Closed Security Screening
4 Neil Farran David Jones 08 October 2004 Trainer Closed Control of ID Cards
5 Neil Farran John Smith 07 October 2004 0 Commencement Handing Over Syste...
6 Neil Farran 27 October 2004 0 Commencement Commissioning Syst...
7 Neil Farran John Smith 12 November 2004 0 Commencement Calibration
8 John Smith 30 April 2005 0 Commencement Supplier Evaluation
12 dsgds werfesf John Smith 31 August 2005 0 Commencement Calibration
13 dsgds werfesf Sally Jones 31 August 2005 0 Commencement Control of Corrective...
14 dsgds werfesf David Jones 31 August 2005 0 Commencement Commissioning Syst...
15 David Jones 0 Commencement Calibration
16 John Smith 0 Commencement Calibration
17 Deborah Sutton 0 Commencement Calibration
18 Andrew Galloway 0 Commencement Calibration
19 Natalie Ross 0 Commencement Calibration
20 Natalie Ross 0 Commencement Commissioning Syst...
21 John Smith 0 Commencement Commissioning Syst...
22 Deborah Sutton 0 Commencement Commissioning Syst...
23 David Jones 0 Commencement Commissioning Syst...
24 Andrew Galloway 0 Commencement Commissioning Syst...
25 Neil Farran 0 Commencement Control of Corrective...
26 Natalie Ross 0 Commencement Control of Corrective...
27 Andrew Galloway 0 Commencement Control of Corrective...
28 Deborah Sutton 0 Commencement Control of Corrective...
29 David Jones 0 Commencement Control of Corrective...
30 John Smith 0 Commencement Control of Corrective...
31 31 August 2005 0 Commencement
Click on one of the links to the left to see the related data

Training elements can be allocated to personnel either in the User Centre, as a result of Training Review, as a result of Evaluation and Appraisal or as a result of an Action or Improvement. Once allocated, they can be initiated by selecting “Manage Training”, “Missing Required Modules” from the “Utilities Menu” in the Data Centre.

Open an individual Training Record by double clicking on a record or select it from the list and click on the “View” button. An Administrator may view all training records using the “Show All Fields” button on the toolbar. A Manager will be able to view all records of personnel for whom they have supervisory or managerial responsibility, i.e. Manager’s will be able to view the records for all staff within their department. Departmental responsibilities are set in the User Centre. If a member of staff without manager or administrator privileges clicks on the “show all” function they will only be able to access their own training records.

Training Requested Tab

First the User selects the name of the trainee, from the drop-down list. If you know whether the required training module will be Internal or External, you can select one of these radio buttons and the list of Training Modules will be restricted to “Internal” or “External”. If you are not sure, select “All” and the list of Training modules will show all registered training courses. Select the Training Module from the list and ensure that it is the correct version number.



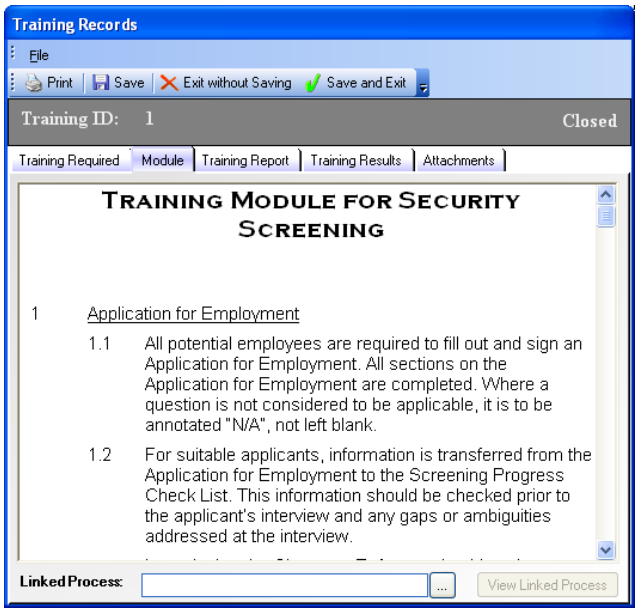
Once the training has been selected it is necessary to specify either location or trainer using the drop-down box. This can be populated with the details of the training organization or the Trainer's Name, etc. If the training is recorded as being renewable training i.e. to be repeated every 2 years, there should be a tick in the "Renew?" box.

The "Check Availability" button allows the Manager or Administrator to check the Trainee's availability to attend the course.

Notes are made about the training, why we are doing it, what we hope to achieve by it, etc. Anything that can provide evidence that the training was diligently given should be recorded.

To obtain a list of "Renewable Training" that is outside the renewal period, select the "Manage Training", "Passed Renewal Date" option from the "Utilities" menu in the Data Centre.

Module Tab

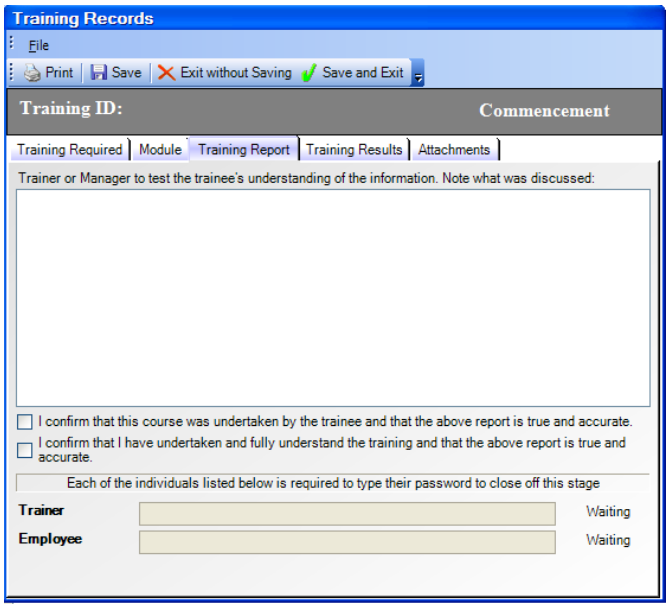

Training Records
File
Print
Save
Exit without Saving
Save and Exit
Training ID: 1
Closed
Training Required
Module
Training Report
Training Results
Attachments
TRAINING MODULE FOR SECURITY SCREENING
1 Application for Employment
1.1 All potential employees are required to fill out and sign an Application for Employment. All sections on the Application for Employment are completed. Where a question is not considered to be applicable, it is to be annotated "N/A", not left blank.
1.2 For suitable applicants, information is transferred from the Application for Employment to the Screening Progress Check List. This information should be checked prior to the applicant's interview and any gaps or ambiguities addressed at the interview.
Linked Process:
View Linked Process

Dolphin automatically copies the Training Module that is registered in the IMS Centre and attaches it to this tab as a read-only document. This is the training material that the trainee will read through to obtain the "standard" training on this subject. The version number of this document is recorded in the Training Record. When the document is amended in the IMS Centre the revision number changes and a report can be generated of "Updated Training Modules" from the "Utilities/Manage Training" menu options in the Data Centre.

If the subject being trained relates directly to a process, a link to that process will appear in the "Linked Process" box. Clicking on the "View Linked Process" button takes the User to that Process in the Process Centre.

Training Report Tab

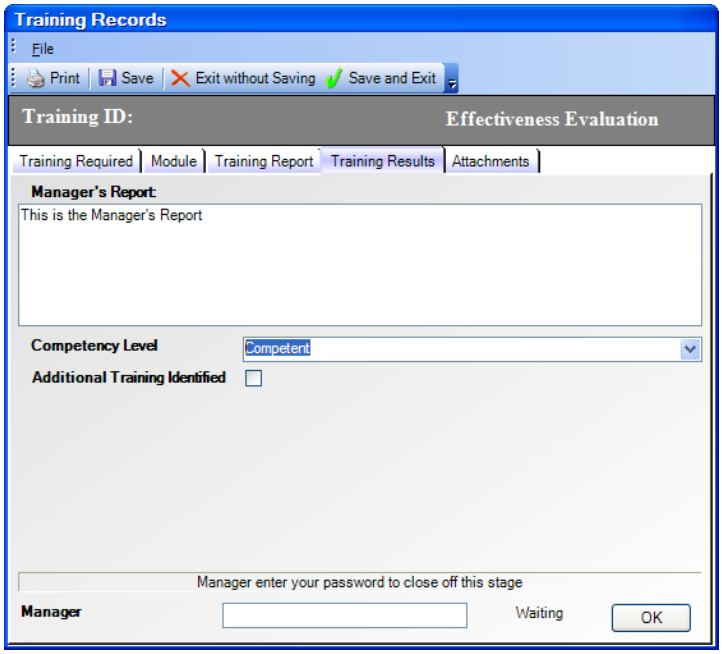
In the Training Report tab the User enters a report of how the training went, what particular difficulties were encountered, how they were overcome etc. If further training is required or weaknesses were discovered, it is important to note them here.


Training Records
File
Print
Save
Exit without Saving
Save and Exit
Training ID:
Commencement
Training Required
Module
Training Report
Training Results
Attachments
Trainer or Manager to test the trainee's understanding of the information. Note what was discussed:
I confirm that this course was undertaken by the trainee and that the above report is true and accurate.
I confirm that I have undertaken and fully understand the training and that the above report is true and accurate.
Each of the individuals listed below is required to type their password to close off this stage
Trainer
Waiting
Employee
Waiting

Regardless of whether there was any additional training specified the Employee must tick both boxes to state that the training was given and that he or she has clearly understood this training. Once both boxes are ticked, the Employee can then add his/her Dolphin Password to the "Employee" box to evidence these statements. The final stage that will lock off this record is for the Trainer to add his Dolphin Password to the "Trainer" box. This record is now locked and cannot be amended. The competency level of this employee for this task is automatically changed to "Trained".

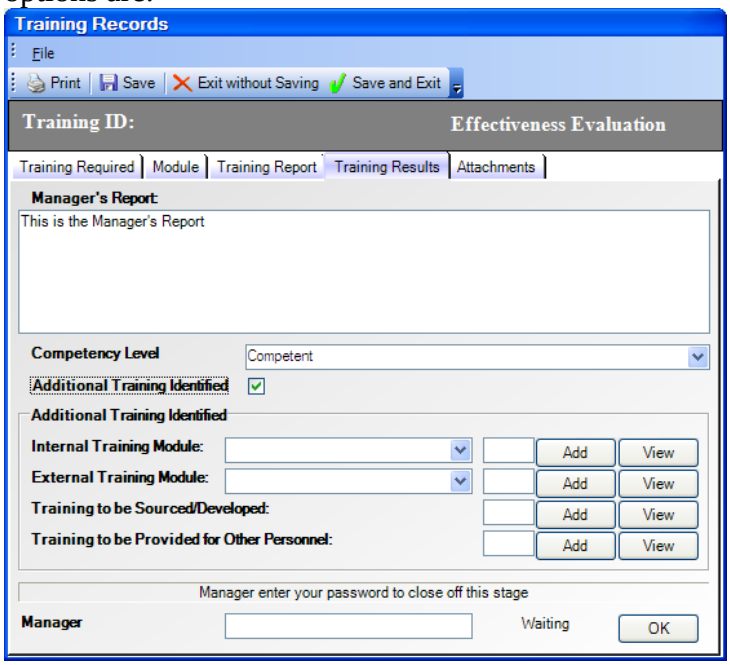
Training Result Tab

After a period of time (depending on the task that has been trained, the frequency of use, the criticality of this task to the company operation, etc) the training must be evaluated to make sure that it was effective and to determine whether it can be built upon or propagated to other staff.



The Manager evaluates the training given predominantly in light of this particular employee. He makes notes in the free text area about what was seen, what reports have been received, etc. Based on this, the employee is awarded a competency level from the drop-down list.

Then the Manager should address whether there has been any additional training identified. The options are:



Select an Internal Training Module to be delivered to this employee. You can click on the “View” button to review the module. When satisfied, click on the “Add” button to create a new Training Record and to allocate it in exactly the same way as this one.

Select an External Training Course to be delivered to this employee. You can click on the “Add” button to create a new Training Record and to allocate it in exactly the same way as this one.

If an additional training need is identified for which there is no training currently, clicking on the "Add" button against the third option causes an Action to be generated with suitable prompter words already inserted. This needs to be completed and handled in the normal way for Actions/Improvements.

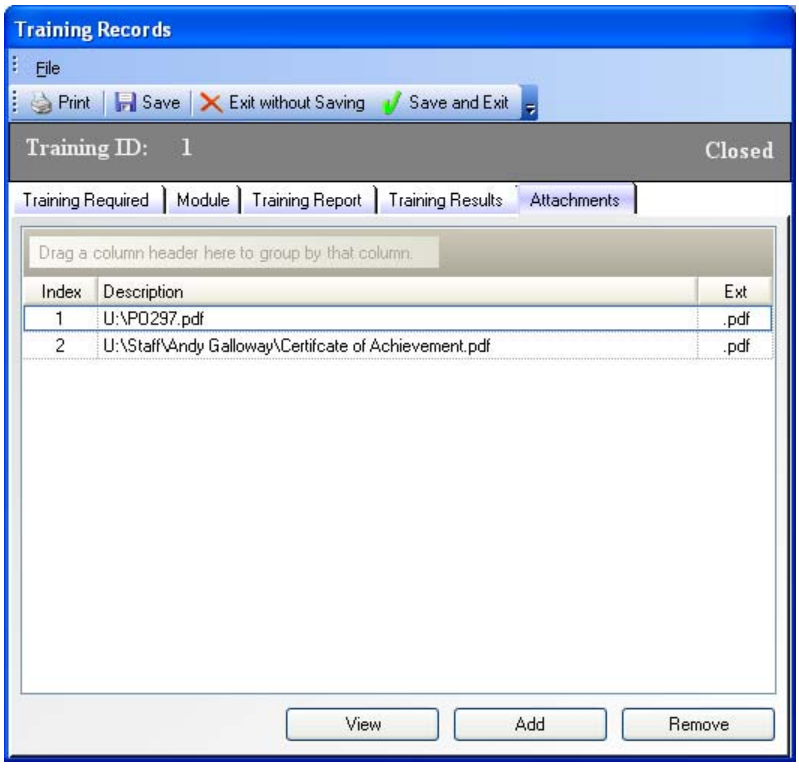
If this training was so useful to this employee, it might be useful to others also. Clicking on the "Add" button against the fourth option causes an Action to be generated with suitable prompter words already inserted. This needs to be completed and handled in the normal way for Actions/Improvements.

The Manager then enters his or her Dolphin password to the sign off box at the foot of the form and presses the "OK" button. This Training Record is now marked as "Closed" in the top right-hand corner of the form.

N.B. - Trying to close the training record without entering Trainer, Trainee and course details will bring up an error message

Attachments Tab

The fifth tab is used to attach any documentary evidence that may be relevant to the training. For example, you might want to scan a copy of a Certificate of Training and attach it to the record. By attaching documents to this tab, you preserve a copy of the document "as it is" for future reference.



You can also scan documents such as reports, handwritten notes, pictures, exam papers, etc and they will become a permanent part of this Training Record.

The functionality for these buttons is described in the "Attachment Tabs" section.

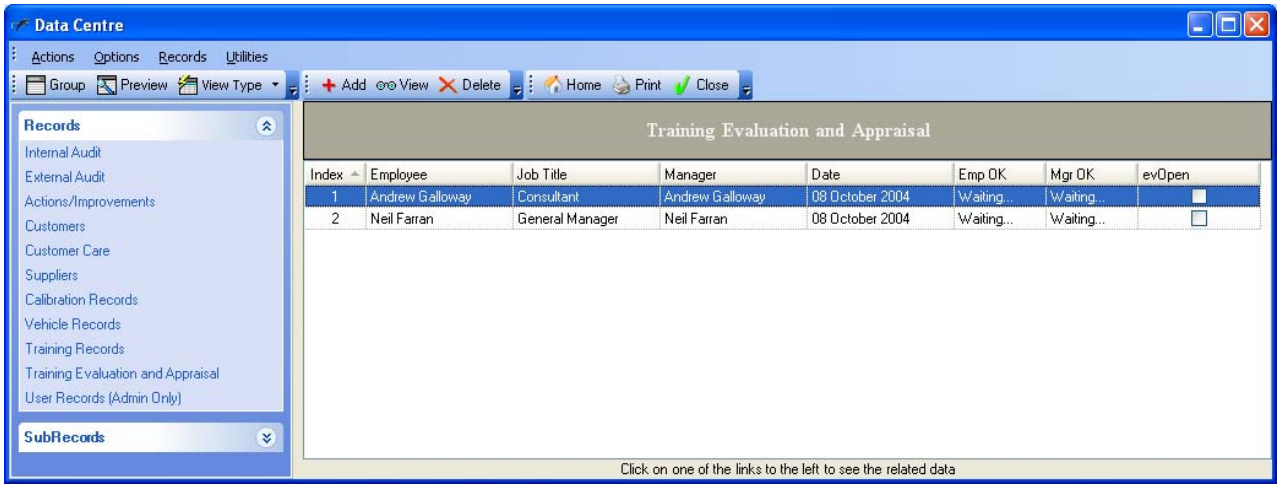
5.2.1.9. Training Evaluation and Appraisal

Introduction

There are number of ways that Training Evaluation and Appraisal can be initiated. Here are a few:

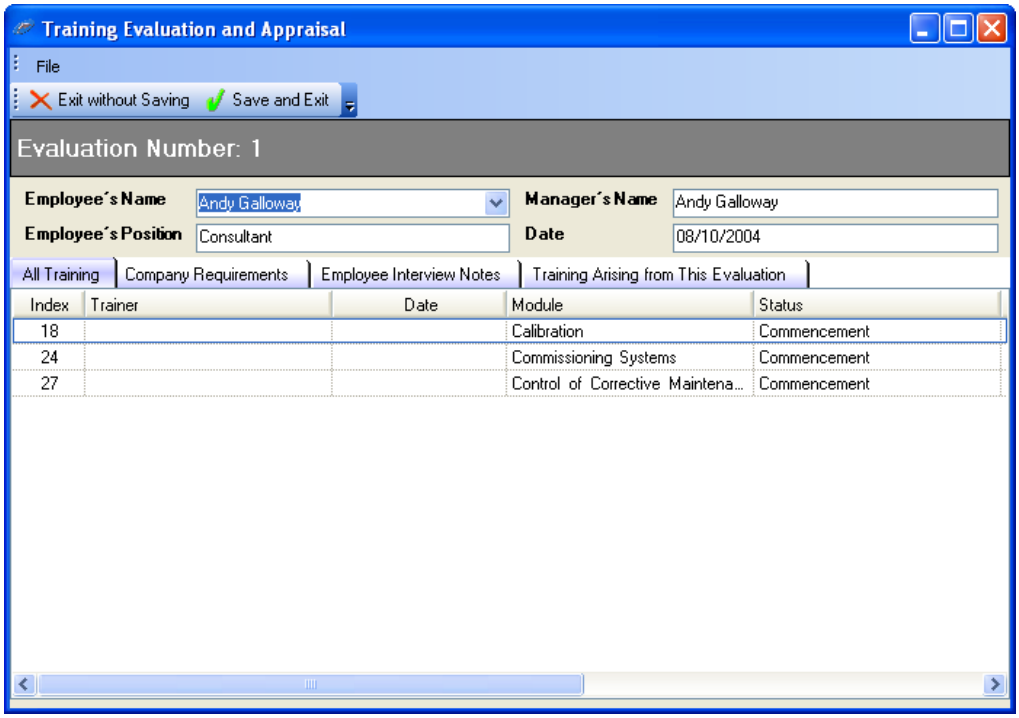
- Annual routine associated with good HR practices
- By running the "Missing Required Modules" utility in the Data Centre and discovering that additional modules have been added to certain job titles
- By running the "Renew Training" utility in the Data Centre to identify training that is approaching or passed its renew date
- By running the "Update Training Modules" utility in the Data Centre to identify training that is required after training modules have been updated.
- Promotion of personnel to a different Job Title will cause additional Required Modules to be allocated to that employee

Training Evaluation and Appraisal Records are created from the Data Centre by selecting Training Evaluation and Appraisal from the Records section. Then from the button bar, select the "+ Add" button.



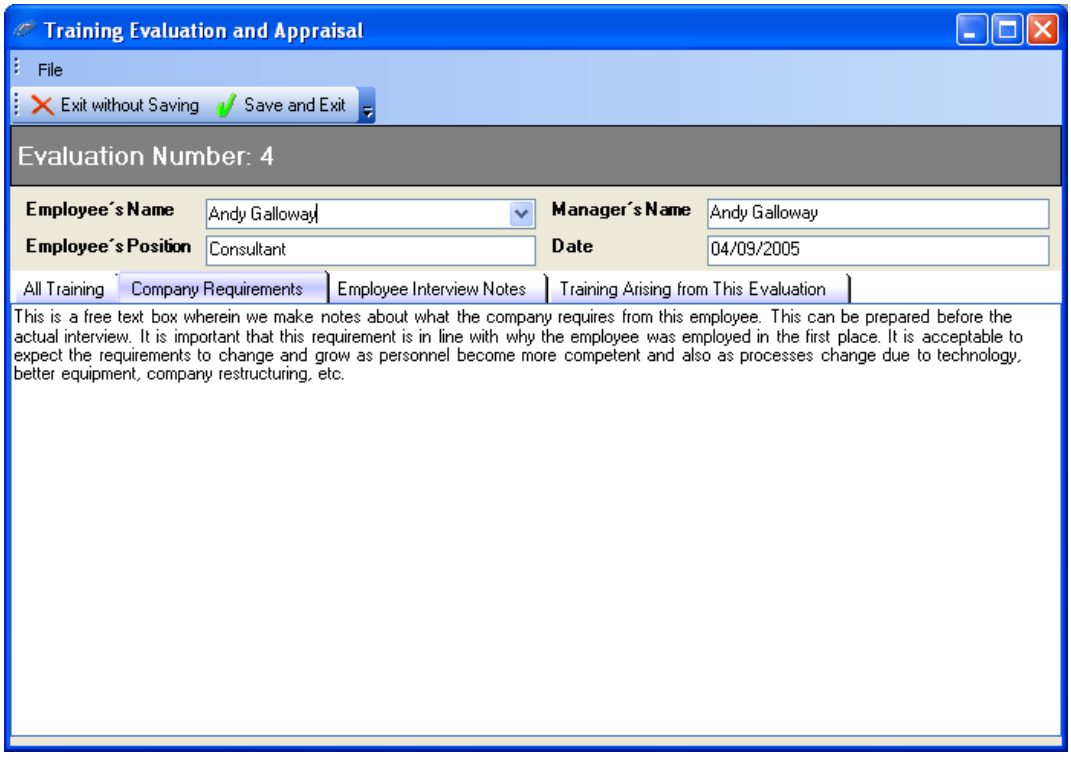
All Training Tab

When you first open a Training Evaluation and Appraisal Record, you initialize the record by selecting the Employee's Name from the drop-down list. All other fields are automatically populated based on the Employee's information. All Training listed for that member of staff appears on the "All Training" Tab. The person conducting the Evaluation and Appraisal discusses some of these training subjects with the Employee, particularly where training needs to be updated or further training becomes apparent.



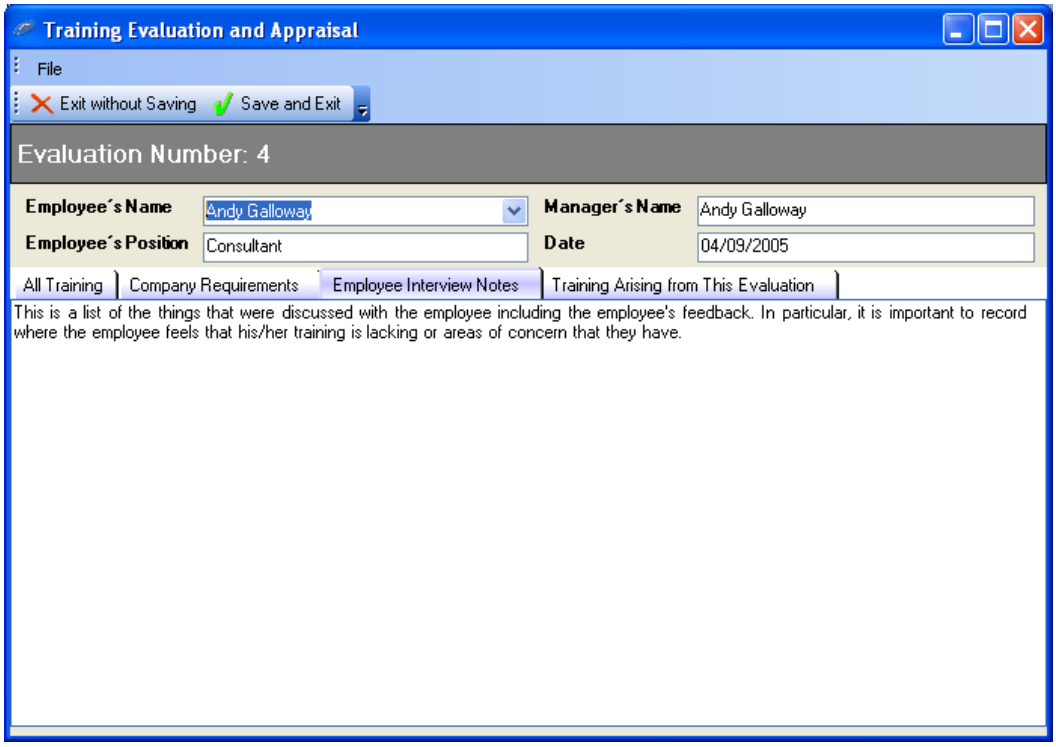
Company Requirements Tab

Click on the “Company Requirements” Tab brings up a free text box wherein we make notes about what the company requires from this employee. This can be prepared before the actual interview. It is important that this requirement is in line with why the employee was employed in the first place. It is acceptable to expect the requirements to change and grow as personnel become more competent and also as processes change due to technology, better equipment, company restructuring, etc.


Training Evaluation and Appraisal
File
Exit without Saving
Save and Exit
Evaluation Number: 4
Employee´s Name
Andy Galloway
Manager´s Name
Andy Galloway
Employee´s Position
Consultant
Date
04/09/2005
All Training
Company Requirements
Employee Interview Notes
Training Arising from This Evaluation
This is a free text box wherein we make notes about what the company requires from this employee. This can be prepared before the actual interview. It is important that this requirement is in line with why the employee was employed in the first place. It is acceptable to expect the requirements to change and grow as personnel become more competent and also as processes change due to technology, better equipment, company restructuring, etc.

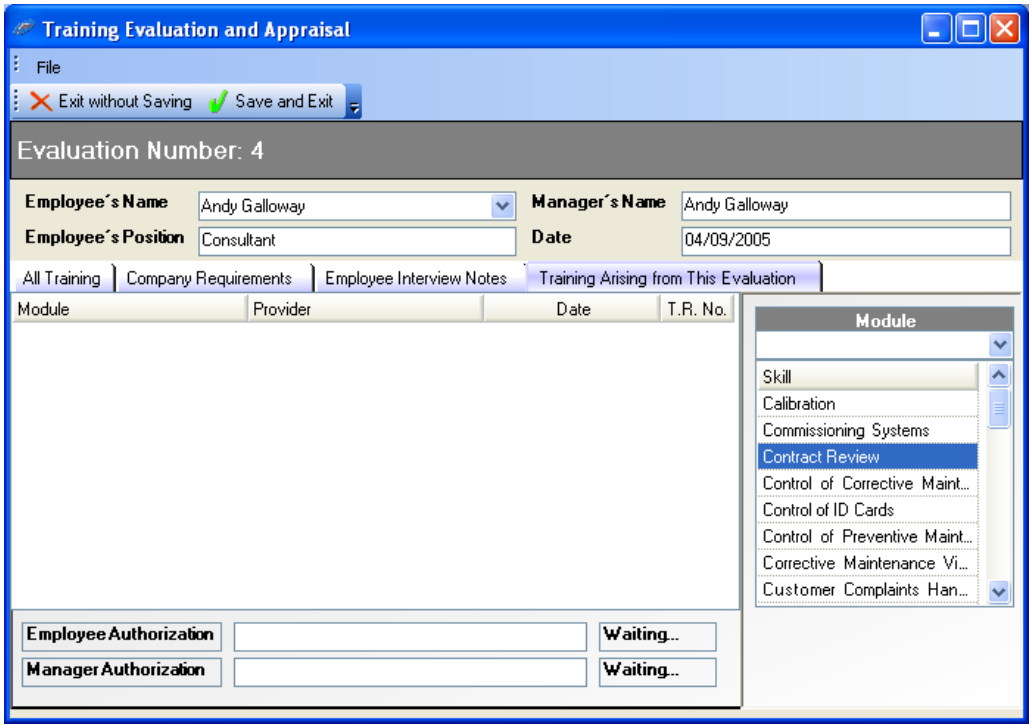
Employee Interview Notes Tab

This is a list of the things that were discussed with the employee including the employee's feedback. In particular, it is important to record where the employee feels that his/her training is lacking or areas of concern that they have.

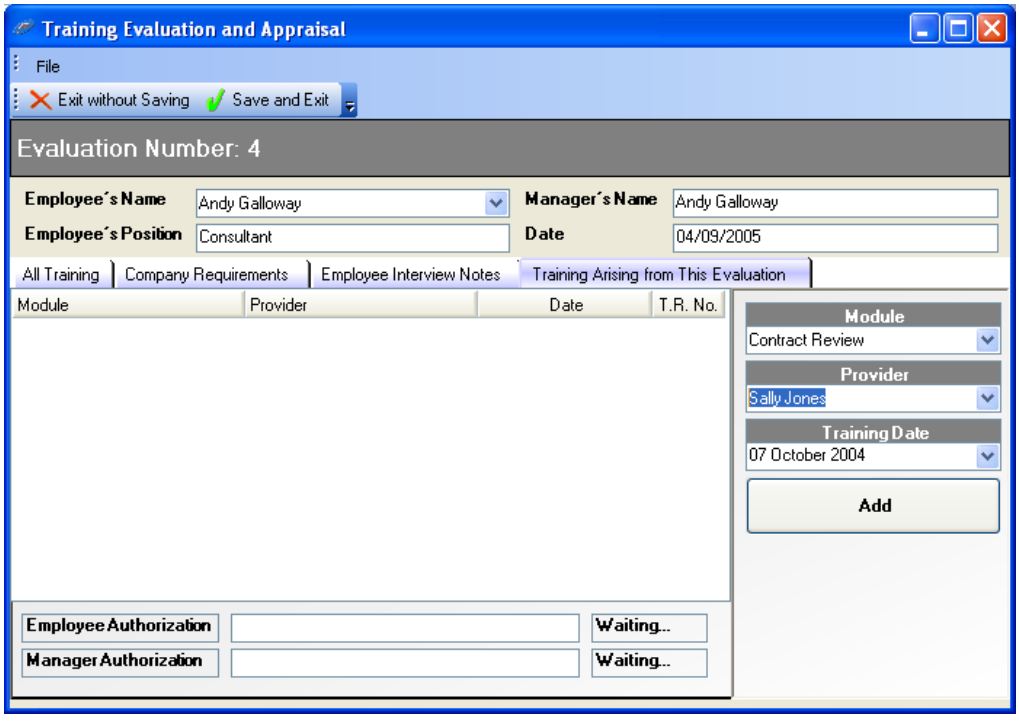

Training Evaluation and Appraisal
File
Exit without Saving
Save and Exit
Evaluation Number: 4
Employee´s Name
Andy Galloway
Manager´s Name
Andy Galloway
Employee´s Position
Consultant
Date
04/09/2005
All Training
Company Requirements
Employee Interview Notes
Training Arising from This Evaluation
This is a list of the things that were discussed with the employee including the employee's feedback. In particular, it is important to record where the employee feels that his/her training is lacking or areas of concern that they have.

Training Arising from This Evaluation Tab

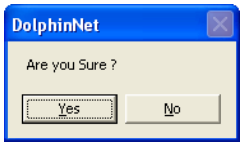
In this tab is the opportunity to identify further training requirements for this employee. Select any additional training that is required from the right-hand panel - select the training in the “Module” drop-down box.



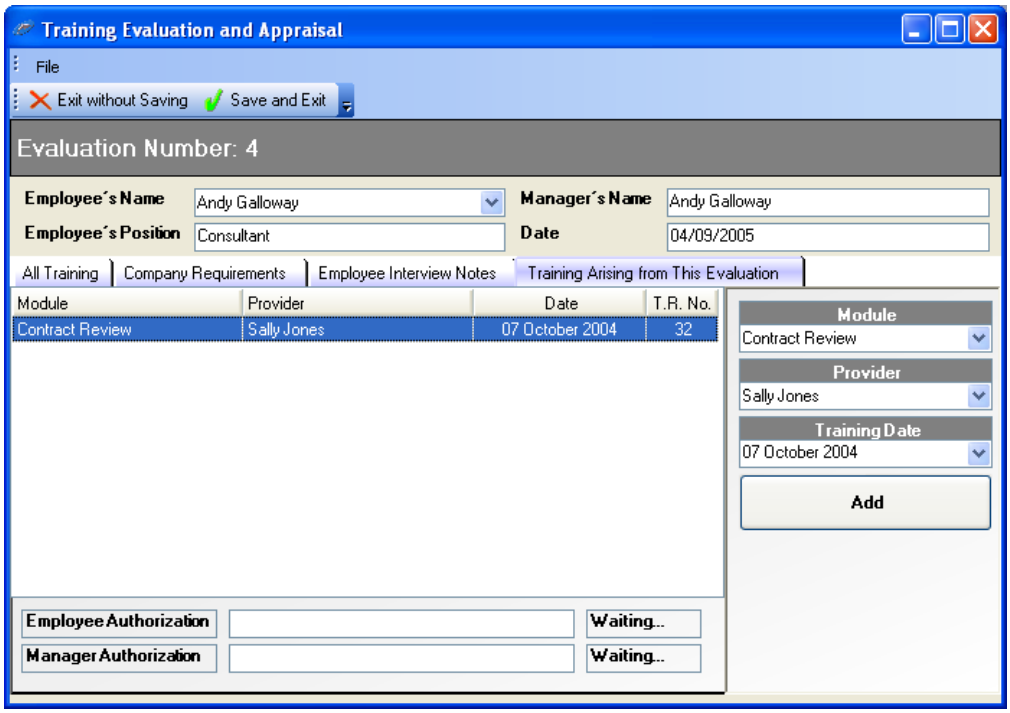
Select the Module and then select the Trainer from the drop-down “Providers” list.



Add a date for the training to take place and click on the “Add” button in the right-hand panel to create the Training Record for this subject. You will be asked:



To cancel this training request, click on “No”. To create it, click on “Yes”.



This will be notified to the Trainer and the Trainee via internal email.

Regardless of whether there was any additional training specified, the Employee must add his Dolphin Password to the “Employee Authorization” box to signify that the evaluation and appraisal that was carried out is accurately reflected in this record. The final stage that will lock off this record is for the Manager to add his Dolphin Password to the “Manager Authorization” box. This record is now locked and cannot be amended.

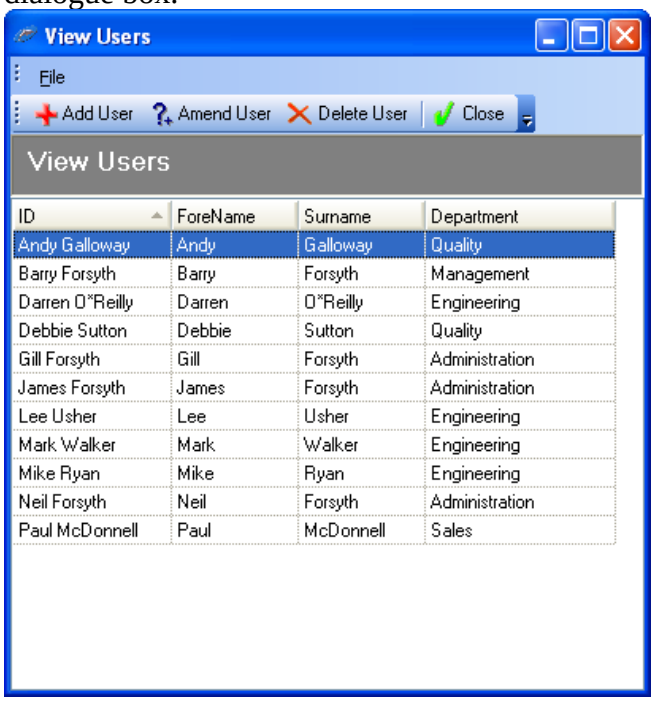
5.2.1.10. User Records (Admin Only)

Creating a New User

When a new employee joins the company, they should be added to Dolphin as a User. This should be part of the HR Joining Routine.

There are two ways to create a new User. The first is from the Dolphin "Main Page" and the other is from the Data Centre. Only an Administrator can create new Users or have unrestricted access to a User's recorded information (all tabs). Once created, a User's manager can view the User's Information (except the Authority tab).

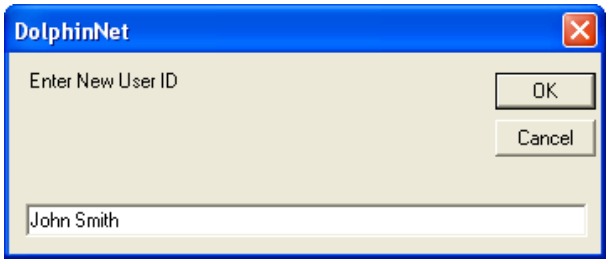
A From the Dolphin Main Page, select the "User Centre" button. This opens up the "View Users" dialogue box.



B From the Data Centre select the "User Records (Admin Only)" option. This takes you to a list of Users. Press the "Add" button to enter a new user as above.

Clicking on the “Add User” button opens a new Dialogue Box asking for the User ID. This field must be filled in as it cannot be blank in any User Records in the system. It is suggested that you use the same convention for all Users and that should be proper names such as “John Smith”, “Peter Jones”, etc. This is the name that will appear on all records, reports, etc.

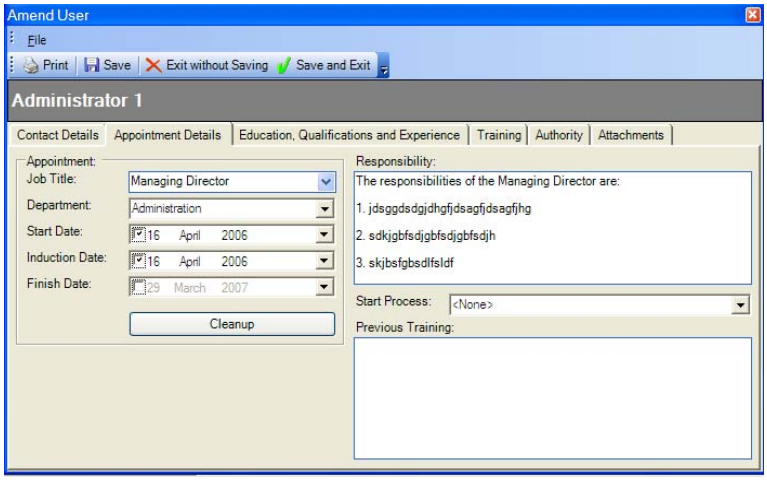
Note: when creating a new user Dolphin will automatically check to see if the user already exists and if so inform the user thereby preventing duplication.



When entered, click on the “OK” button. This will open the “Amend User” form for the new User at the “Contact Details” tab. Work through the tabs from left to right.

To access the record of an existing User, select it from the list and click on the “Amend User” button. The record for that User will open up on the “Contact Details” tab.

Contact Details



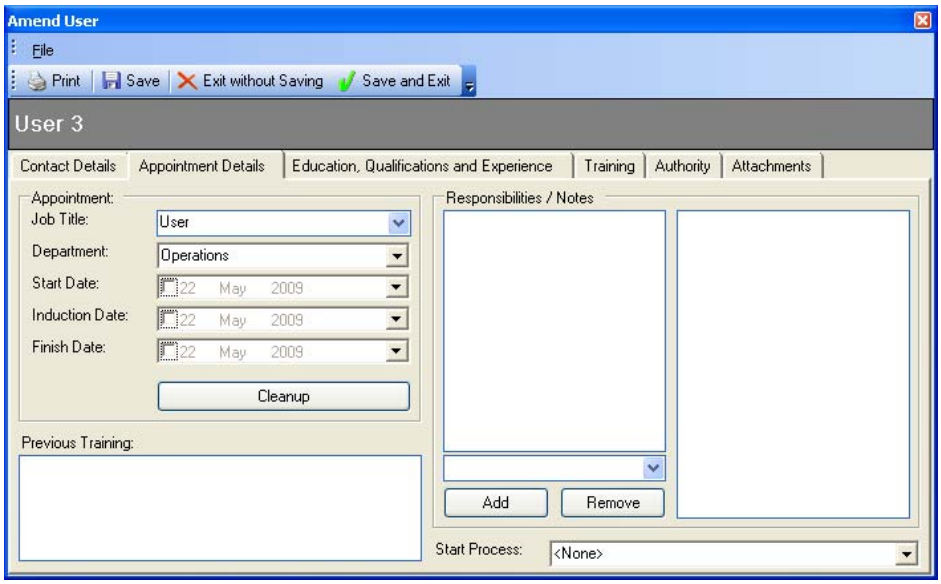
All of the User’s personal details should be added to this Tab. Some records that are produced in the Report Centre rely on this information, for example the Staff Telephone List. It should be borne in mind that this information is restricted to Administrators of the system and the new User’s Manager.

When somebody leaves the company and still has outstanding training planned by using the “Cleanup” button will erase all outstanding training from the individual.

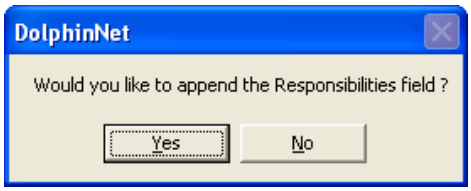
If Mails are required to be sent to this User automatically via Microsoft Outlook, their external email address needs to be entered in the “E-Mail:” field and the system needs to be set up for this facility if the Preferences section.

Appointment Details

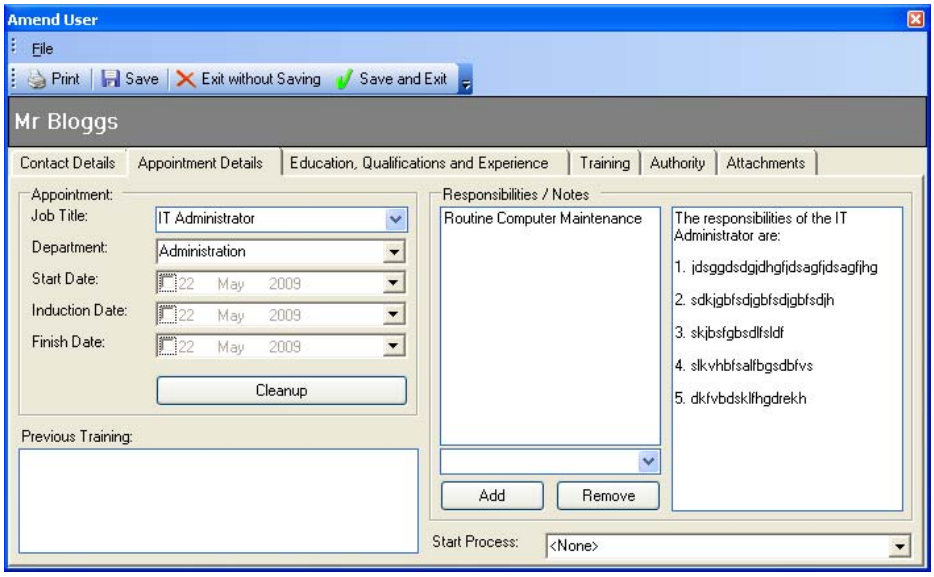
In this tab, the new employee should be allocated a Job Title. On doing so, all Required Training Modules for that Job Description are automatically added to the Training Tab and to the relevant "required modules by user" subrecord. They need to be allocated to a Department so that their Manager can be assigned the correct privileges. The start date is automatically entered as the system date but this can be changed.



Selecting the "Job Title" also brings up a message box asking whether you want to import the "Responsibilities" that were set up under the "Job Title" Subrecords.



Selecting "Yes" causes the Responsibility field to be populated automatically.



If a staff member changes their job description and responsibilities, the User record should be opened and amended. If the job title is changed, Dolphin will prompt the Administrator or Manager to decide if the responsibilities of the previous role should remain or not.

Required Training Modules can be planned and arranged using the Utilities Menu in the Data Centre.

Once the company induction is completed, this record should be revisited and the "Induction Date" box ticked as completed.

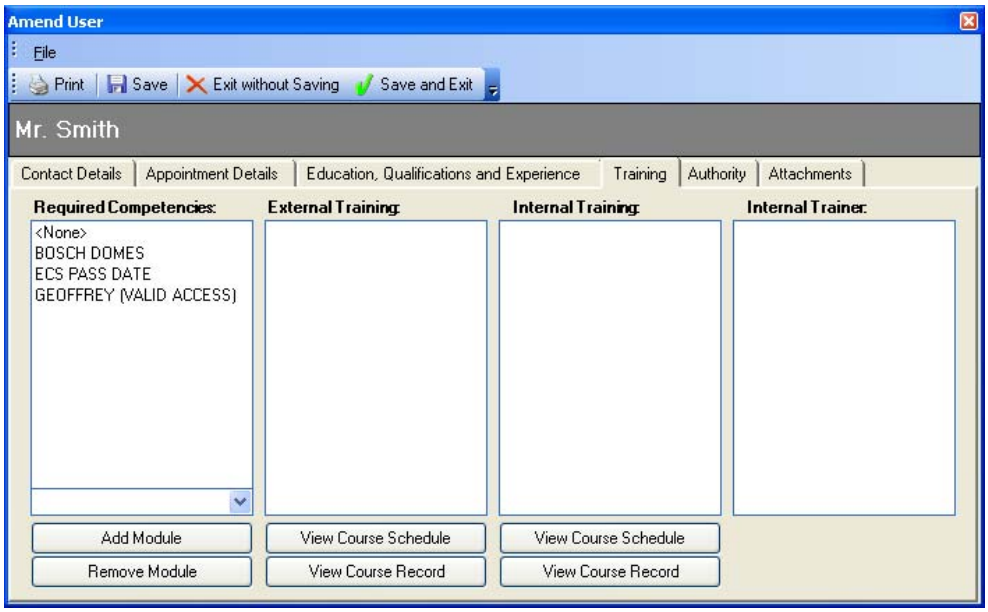
When the member of staff leaves the company, this record should be revisited and a tick put in the "Finish Date" tick box. Dolphin will ask if the cleanup routine is to be activated. If so, the "Finish date" will automatically be entered for that date. This is important as the User will then be removed from all drop-down lists and a report can be generated of all tasks that are allocated to this User at the time that they left the company. This User will also have their skills removed from the "Required Competencies" calculations and a Critical Skills Shortage Report may show a shortage in certain areas that this User was responsible for. The User Cleanup function will also automatically create a Corrective Action for the Site Administrator to request that the duties and responsibilities of the user are reassigned thus ensuring that critical skills are not overlooked.

Education, Qualifications and Experience and Previous Training can all be added to the various boxes as free text. If the "User Process" option is selected in Preferences, the "Start Process" for this User can be allocated in this tab from the drop-down list of available processes.
Then the manager should address whether there has been any additional training identified. The options are:

- Select an Internal Training Module to be delivered to this employee. You can click on the "View" button to review the module. When satisfied, click on the "Add" button to create a new Training Record and to allocate it in exactly the same way as this one.
- Select an External Training Course to be delivered to this employee. You can click on the "Add" button to create a new Training Record and to allocate it in exactly the same way as this one.
- If an additional training need is identified for which there is no training currently, clicking on the "Add" button against the third option causes an Action to be generated with suitable prompter words already inserted. This needs to be completed and handled in the normal way for Actions/Improvements.
- If this training was so useful to this employee, it might be useful to others also. Clicking on the "Add" button against the fourth option causes an Action to be generated with suitable prompter words already inserted. This needs to be completed and handled in the normal way for Actions/Improvements.

The Manager then enters his or her Dolphin password to the sign off box at the foot of the form and presses the "OK" button. This Training Record is now marked as "Closed" in the top right-hand corner of the form.

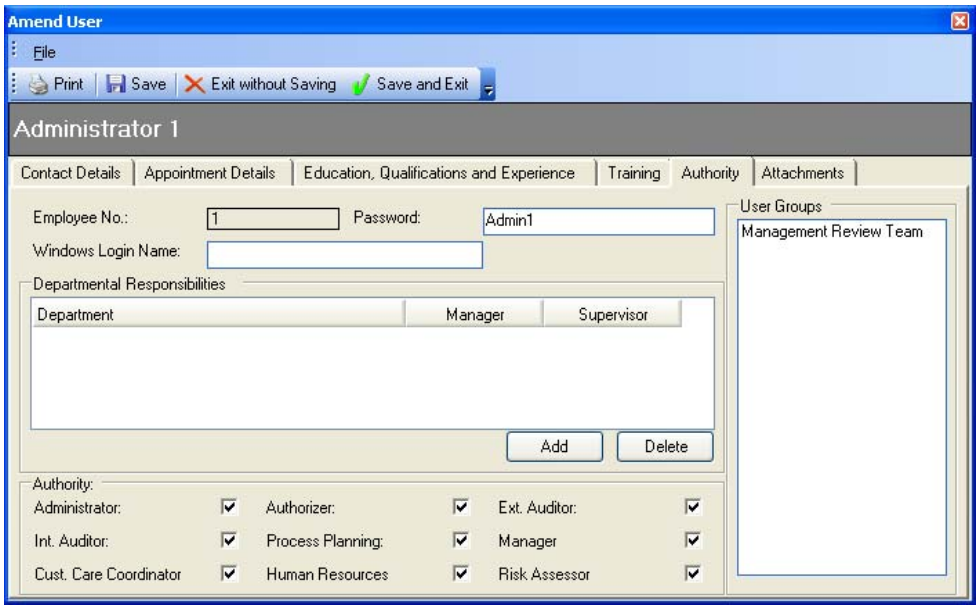
Training Tab



The Required Competencies is a free text field in which you can state the various requirements that the company expects from a person with this Job Description. Also in this tab it is possible to view the Training Record for any External or Internal Training given. Courses where this User is allocated as Trainer are automatically listed in the “Internal Trainer” box.

The “Add” module button, allows additional training modules over and above the requirements of the post to be added. The “Remove” module button allows a Manager or Administrator to remove any training modules that relate to tasks, which will not be undertaken by the staff member.

Authority Tab



Access to this tab is restricted to Administrators only. Managers and Supervisors of Departments should be allocated using the Add button; selecting the department from the drop down list and

ticking the relevant tick box, then press enter to register the change. Managers and Administrators can sign off the Training Records for personnel in the specified Departments.

The Windows login name may also be added to the user's record and it is important this is recorded if the user wants to make use of Dolphin Event Checker.

Authorities are added by placing a tick in the relevant tick box on the right-hand side. The different authorities are:

- Administrator - has full authority to make system-wide adjustments
- Authorizer - has authority to authorize Actions and Improvements
- Ext. Auditor - has authority to sign off External Audit Records
- Int. Auditor - adds the User to the list of Auditors in the Internal Audit Records
- Process Planning - has authority to edit and save Process Maps
- Manager - designates this User as the Manager of their allocated department
- Cust. Care Controller - designates this User as the Customer Care Controller for the routing of Customer Care issues
- Human Resources - has authority to view the Training Records and Training Evaluations of all Users
- Risk Assessor – has the authority to undertake risk assessments.

If a standard user, i.e. one without authorities set, clicks on the User button on the home page they will be taken to a Read Only version of their personal user record. They are unable to access other users' records.

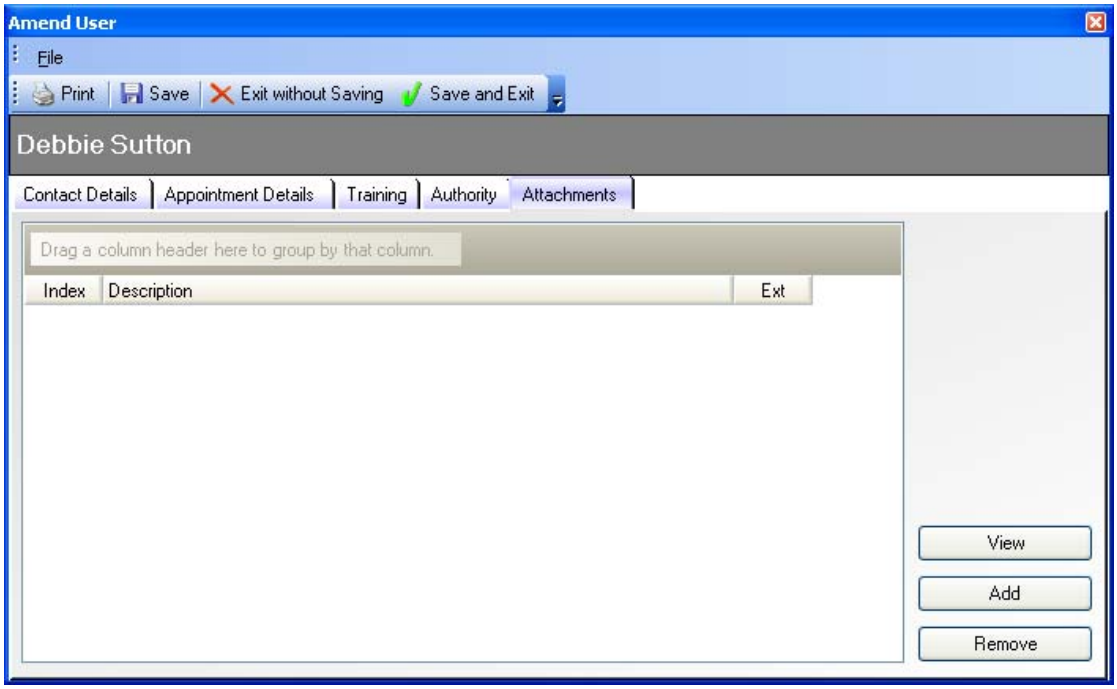
An Administrator has the authority to remove "Attachments" to records, when necessary. Such attachments may be removed from the following records:

- Internal Audits
- External Audits
- Actions / Improvements
- Customer Care
- Training Records
- Meeting Records
- User Centre

The Authorities tab also displays the User Groups relevant to the User.

Attachments Tab

This tab is used to attach any documentary evidence that may be relevant to the employment of that person. This might be copies of professional qualifications, diplomas, etc. It might even be a copy of the contract of employment, with subsequent versions being added later to provide a complete history of that person's employment or evidence that Security Screening has been carried out. By attaching documents to this tab, you preserve a copy "as it is" for future reference.

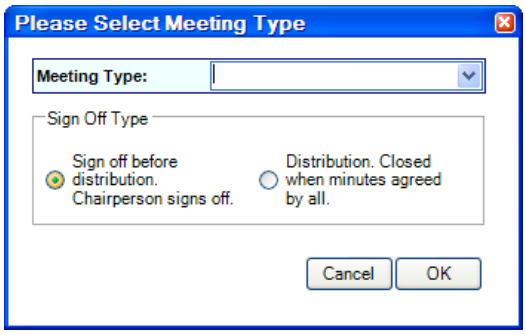


You can also scan documents such as reports, handwritten notes, Certificates of Training, etc and they will become a permanent part of this Employment Record.

The functionality for these buttons is described in the "Attachment Tabs" Chapter for the Data Centre.

5.2.1.11. Meetings

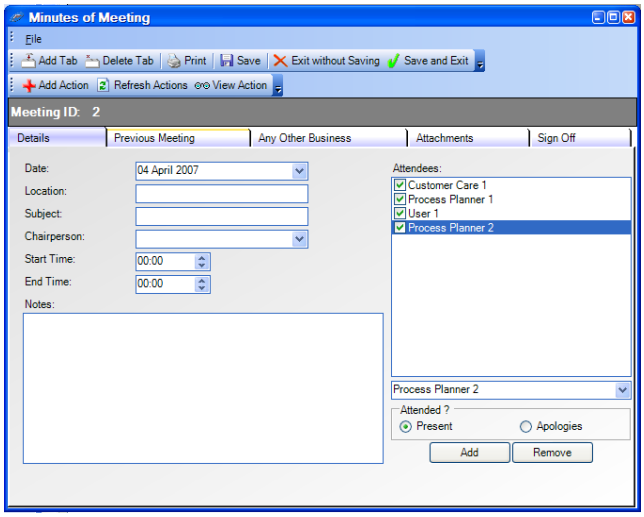
This area can be used to plan and hold the minutes of meetings of many different kinds. The first popup that appears after selecting “Add” enables you to choose the meeting type and the type of sign off to the meeting that is required.



From the Explorer Bar, select the list of Meetings. On the toolbar, select “Add”. This creates a new record with the four basic tabs on it. The first two tabs and the last two tabs of all meetings records are the same. Additional subjects are added or removed using the “Add Tab” and “Delete Tab” buttons on the toolbar.

Details Tab

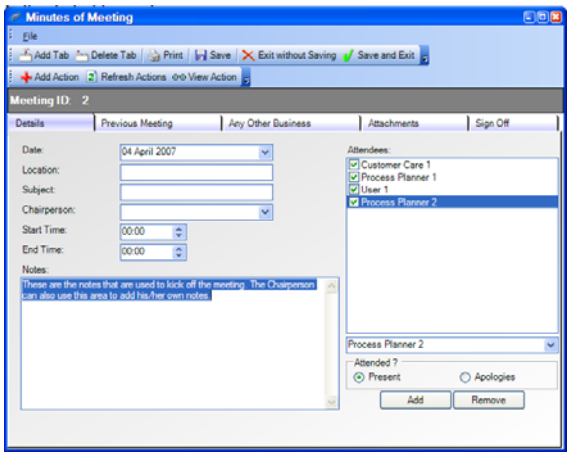
The first tab is to record the details of the meeting such as location, date, time, Chairperson, attendees and there is even a notes area so that announcements and other information can be recorded prior to the start of the meeting.



Before Attendees can be added to the record, the record must be saved, thereby allocating it a record number and storing it in the database. You will be prompted to do this should you forget.

Ensure you select “save” **not** “save and exit”. A meetings record may only be viewed by the attendees of the meeting. Therefore, if “save and exit” is selected attendees have not been added, it will not be possible to open the record.

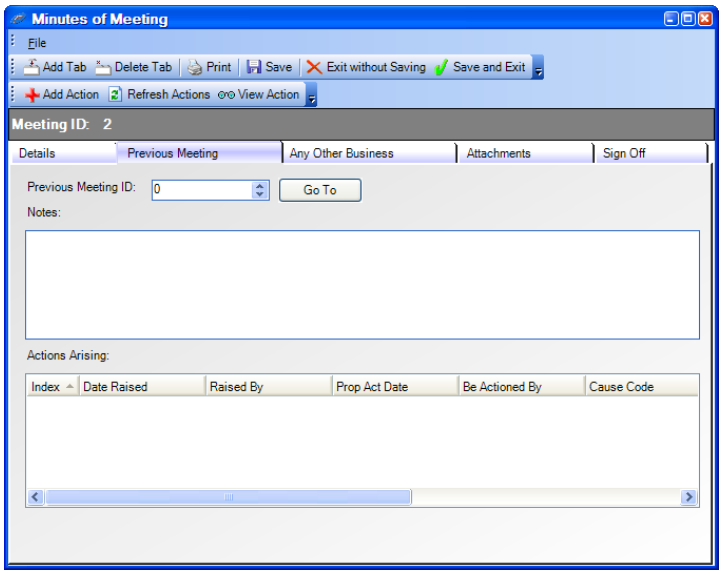
To add Attendees, select the relevant user in the drop-down box and click on the “Add” button.



To remove Attendees, select them on the list of Attendees and click on the “Remove” button.

Previous Meetings Tab

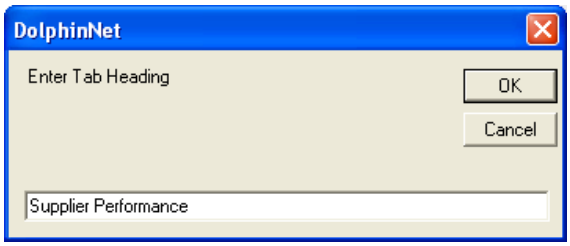
On the “Previous Meeting” tab, enter the number of the Previous Meeting of this type. The “Go To” button will then enable you to quickly call up the record of that earlier meeting.



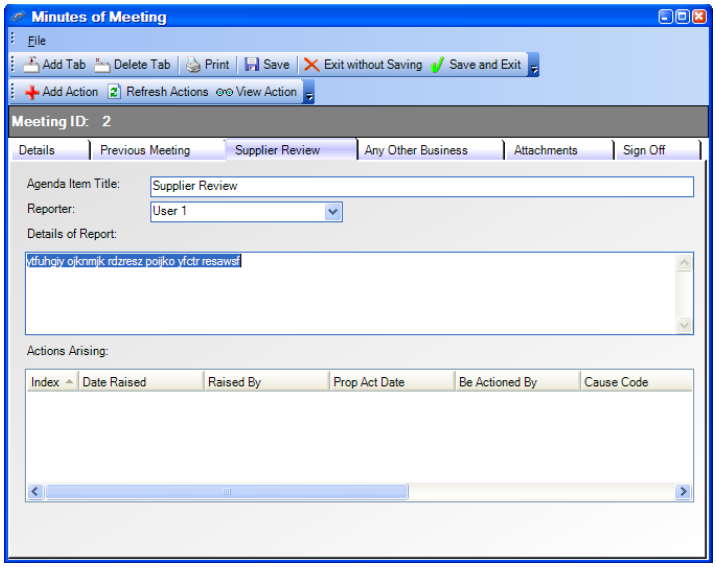
This purpose of this tab is so that the previous meetings minutes can be checked to ensure that all actions raised have been satisfactorily addressed. Record in the notes section what was said and by whom and what conclusion was reached with regard to the previous meeting. Should there be any further actions arising, you can raise a new action by clicking on the “Add Action” button.

Any Other Business

Clicking on the “Add Tab” button opens a dialogue box asking for the subject to which the new tab will refer.



Selecting “Cancel” will cancel the “Add Tab” operation. Selecting “OK” will create a new tab and add it onto the tab bar immediately prior to the “Any Other Business” tab.



Tabs can be pre-prepared, i.e. prior to a meeting so that an agenda can be worked out and followed or they can be added during the meeting.

The person reporting to the Chairperson on a particular subject is selected from the drop-down list of users. When the person makes their report, information should be entered in the “Details of the Report” box summarizing the content of the report and including dates, times, names, etc.

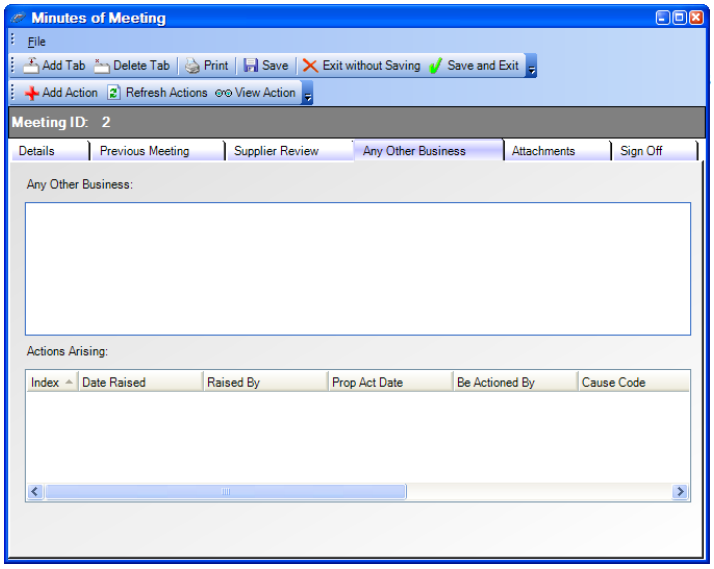
The report should be factual and accurate, i.e. record what was said and by whom and what conclusions were reached with regard to this subject. Should there be any actions arising as a result of this subject being discussed, raise a new action by clicking on the “Add Action” button.

To ensure the meeting flows without interruption it may be appropriate to re-visit the minutes after the meeting has closed and raise any necessary actions at this point.

The meeting should proceed through each tab, recording the reports and raising actions as necessary until the “Any Other Business” tab is reached.

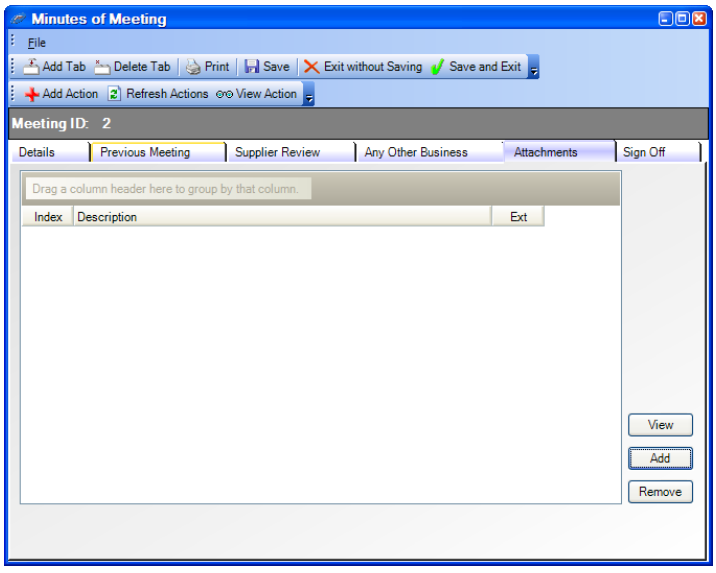
Any Other Business Tab

This tab is used to record all discussions that are not part of the general subject matter of the meeting, but that still need to be addressed. Should there be any actions arising as a result of this subjects being discussed, raise a new action by clicking on the "Add Action" button.



Attachments

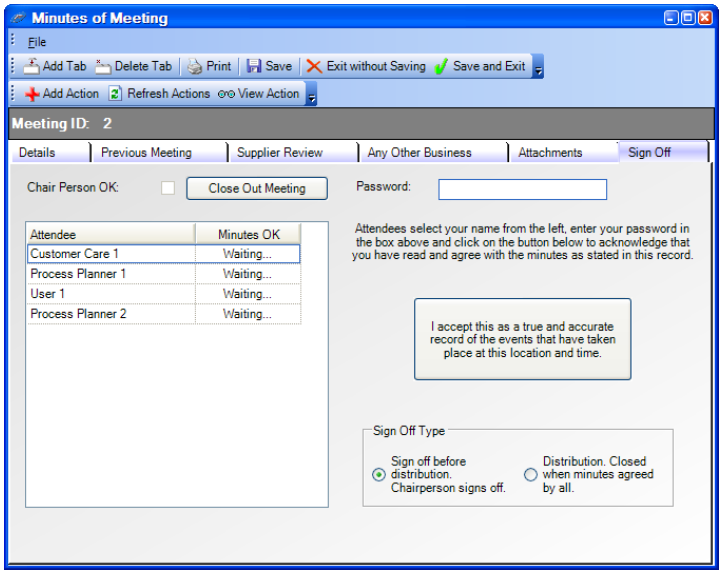
You can also scan documents such as reports, handwritten notes, etc and they will become a permanent part of this Meeting Record.



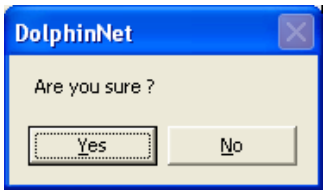
The functionality for these buttons is described in the "Attachment Tabs" section for the Data Centre.

Sign Off Tab

The sign off tab is used to control the authorization and distribution of the minutes.

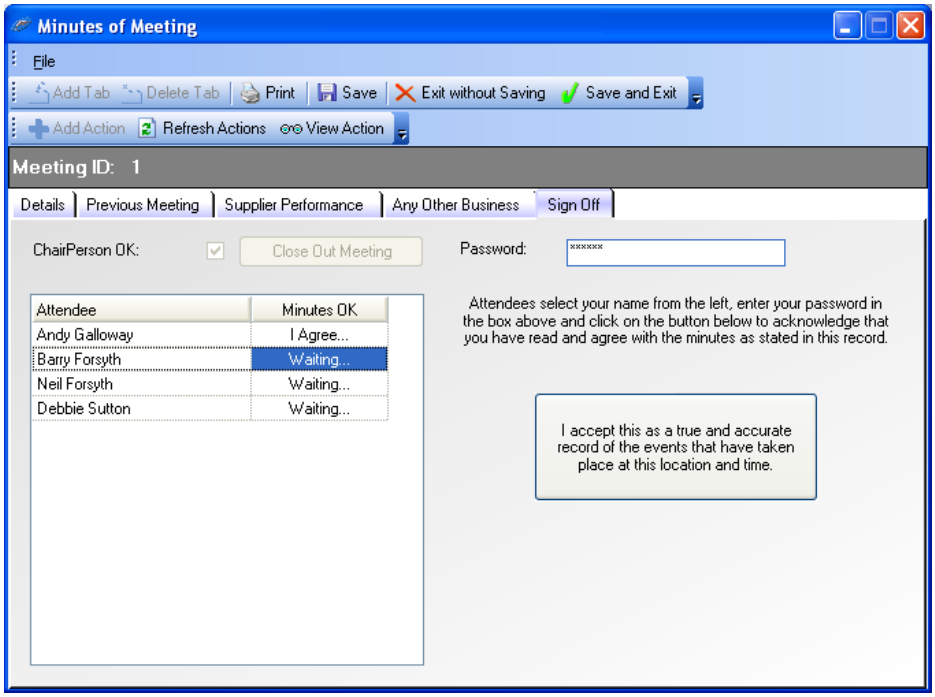


The Chairperson inserts their password into the Password box and clicking on the “Close Meeting” button, will lock the records in these minutes. After authorization, the minutes cannot be changed in any way shape or form. There is a final check before you do that asking whether you are sure.



Clicking “No” cancels the locking routine. Clicking “Yes” causes the record to be permanently locked, the “Chairperson OK” tick box is ticked and grayed out, the “Close Meeting” button is grayed out and the “Closed” column on the list of meetings in the Data centre is ticked. The only thing still active is the Attendees Sign Off.

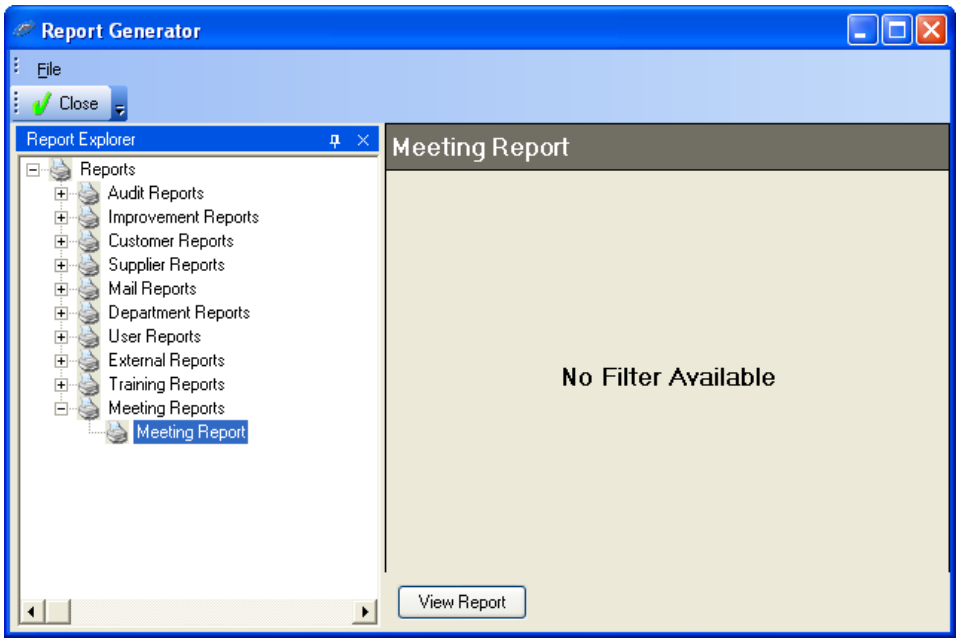
Each Attendee is to read the minutes of this meeting and make notes of any items that are to be discussed at the next meeting. (If the Chairperson has not yet closed the meeting, then it is possible for that Attendee to get their amendments incorporated into this record). Each Attendee select their name from the list, enters their Password in the “Password” box and clicks on the large button in the middle of the left hand panel. This marks that Attendee as having read the minutes by replacing the word “Waiting…” with the words “I agree…” against their name in the list.



All Attendees at a meeting should sign off the minutes as soon as possible.

Printing Minutes

Within the Report Centre is a report layout for printing minutes of meetings.

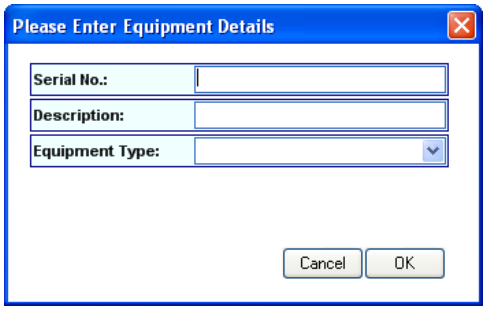


5.2.1.12. Asset Register

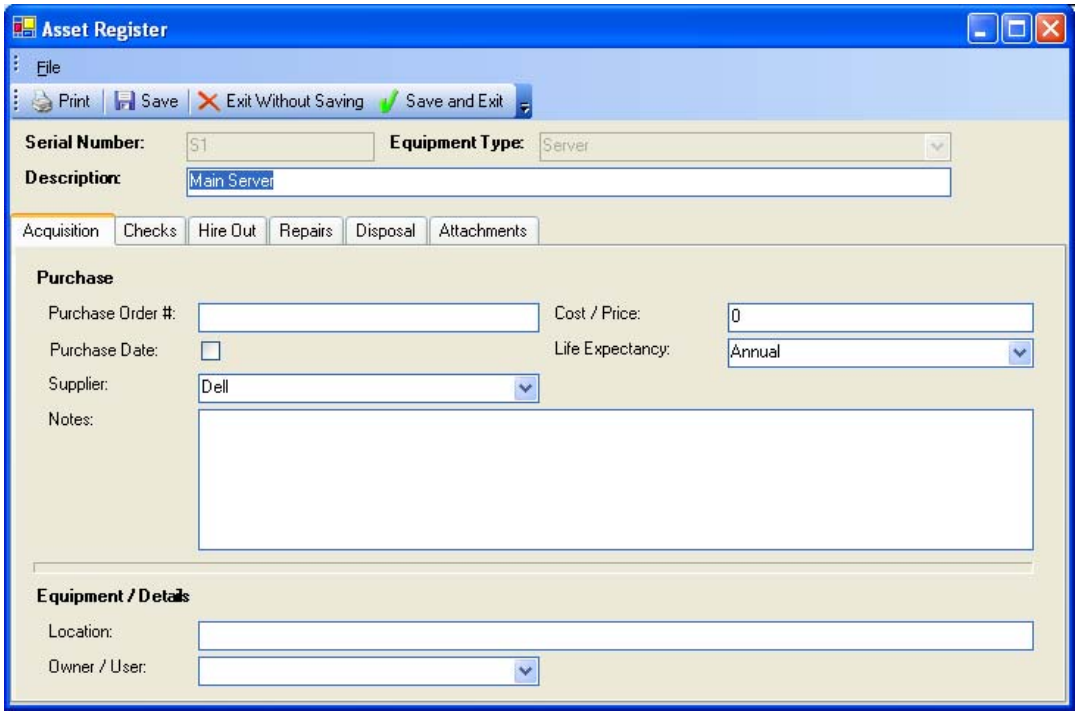
The correct procedure for managing equipment checks is to set up the required subrecords. These stages must be completed to enable the addition of an item of equipment that uses a particular equipment type.

Acquisition

When a new asset record is first entered Dolphin requests the serial number, description and equipment type, as below:



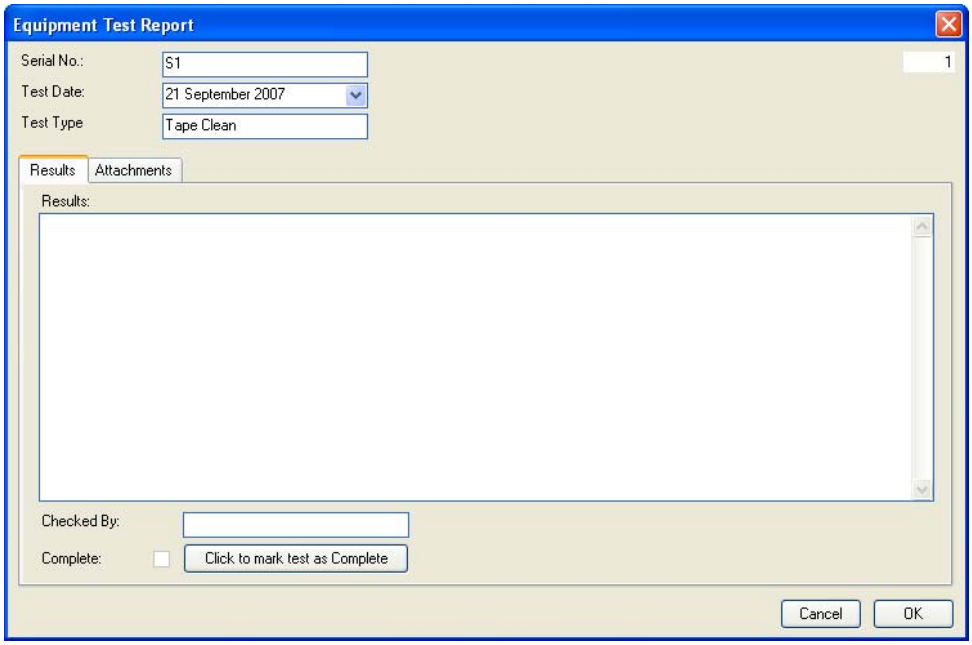
Once the Administrator clicks ok, the following window appears:



The Administrator should add the relevant purchase information in the “Acquisition” section, e.g. purchase order number. It is important to assign the location and owner of the equipment.

Checks

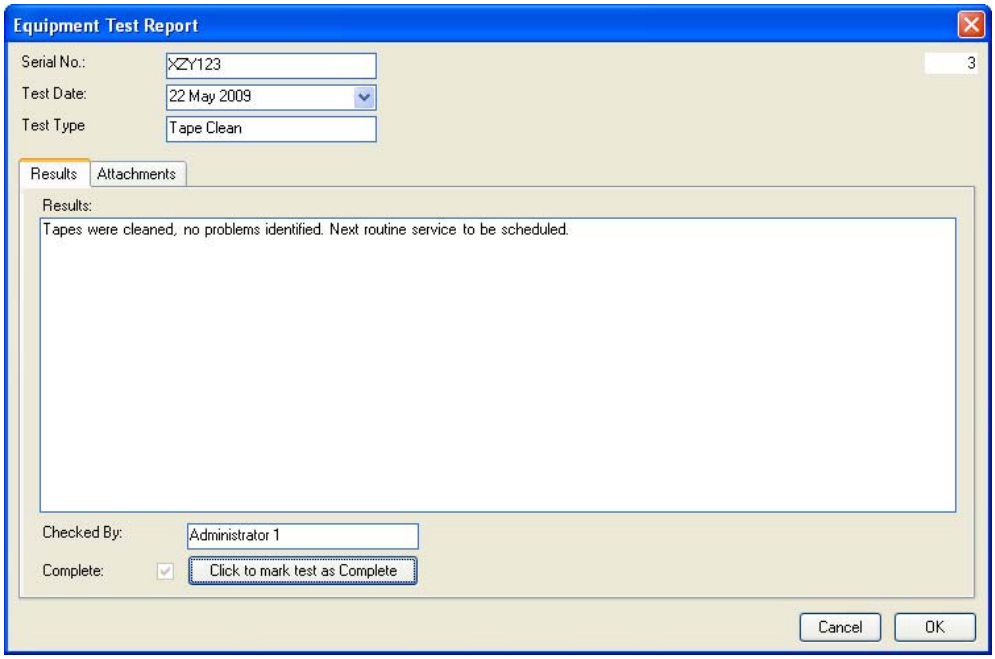
Once this data has been input the “checks” tab is selected. Details relating to the types and frequency of checks will be displayed here. The checks required for an equipment type are set up via the subrecords section. By double clicking on each ‘check’ it will bring up a new window, as shown below:



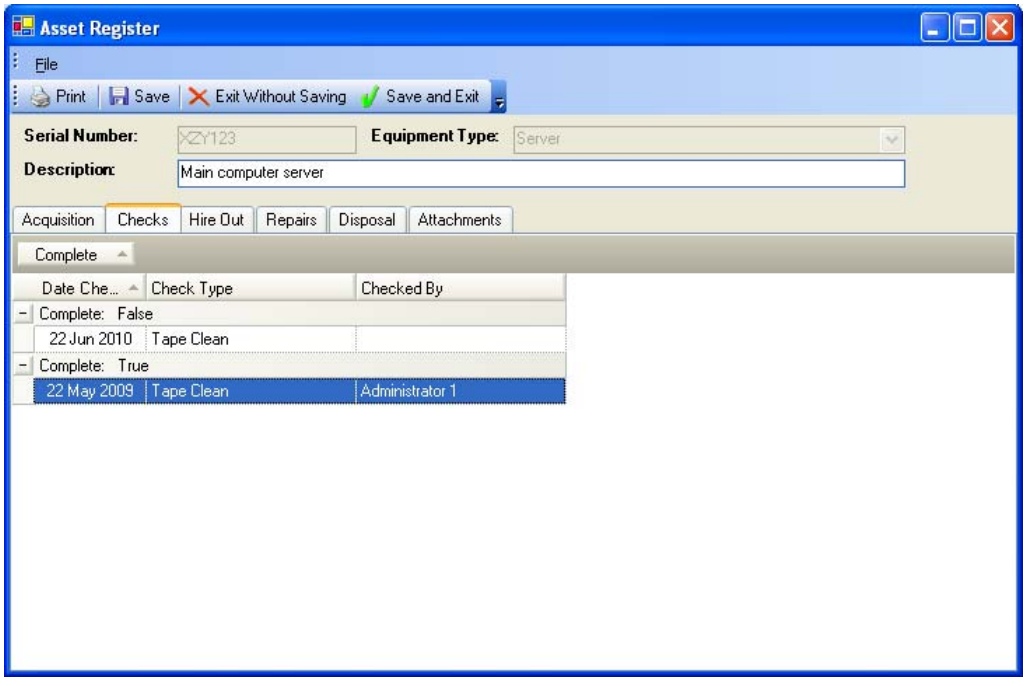
If the check actually occurred on a different date to the one scheduled, the date can be altered by selecting the drop down arrow and then choosing the correct calendar date. The results of the check should be recorded. It is not possible to sign the record off as complete if there isn’t any information in the “results” section.

Additionally, it is possible to save relevant attachments, e.g. test reports, calibration certificates, etc., to the record if required. The functionality for this button is described in the “Attachment Tabs” section of the Data Centre.

When all the relevant details have been added and any attachments made, the record should be closed out. To do this, the “Click to mark test as complete” button is selected. This will automatically add a tick to the checkbox and add the name of the person closing the record, e.g.

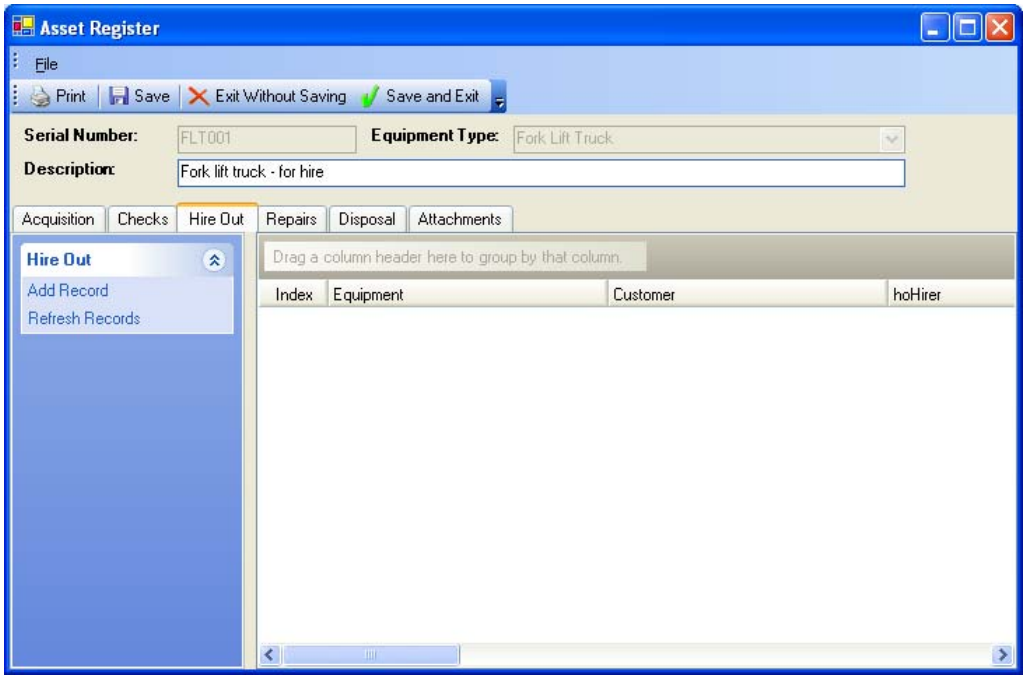


Dolphin updates the data in “Checks” field, to record the date of the last equipment check. This is logged as a true record. The system will add a new record, which is scheduled according to the frequency set for this type of check in the subrecords. It is possible to double click on the new equipment check and change the date for the next test, as appropriate.

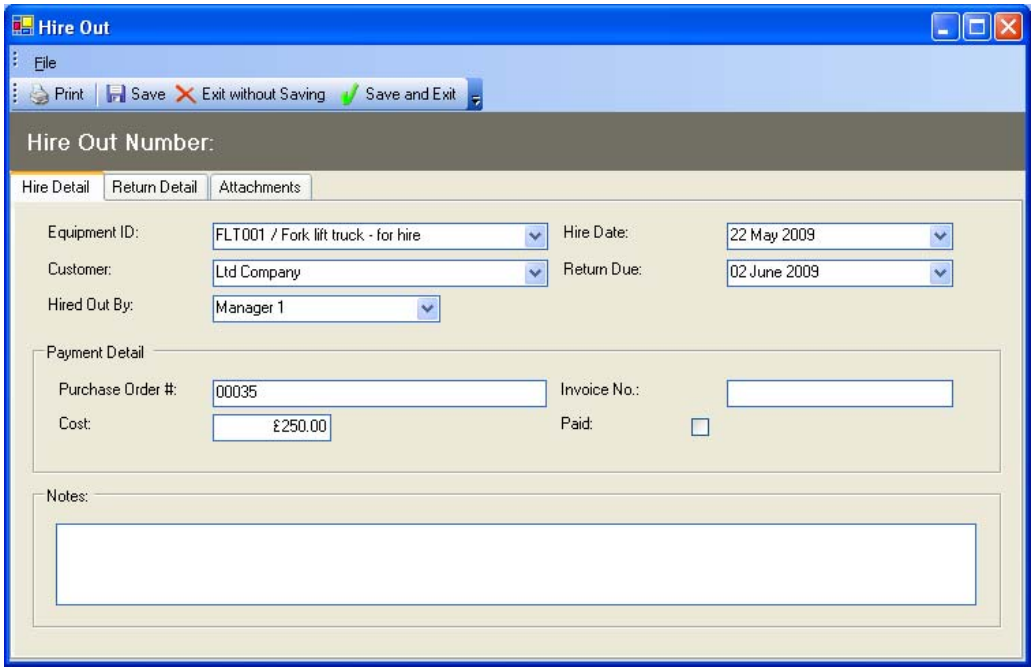


Hire Out

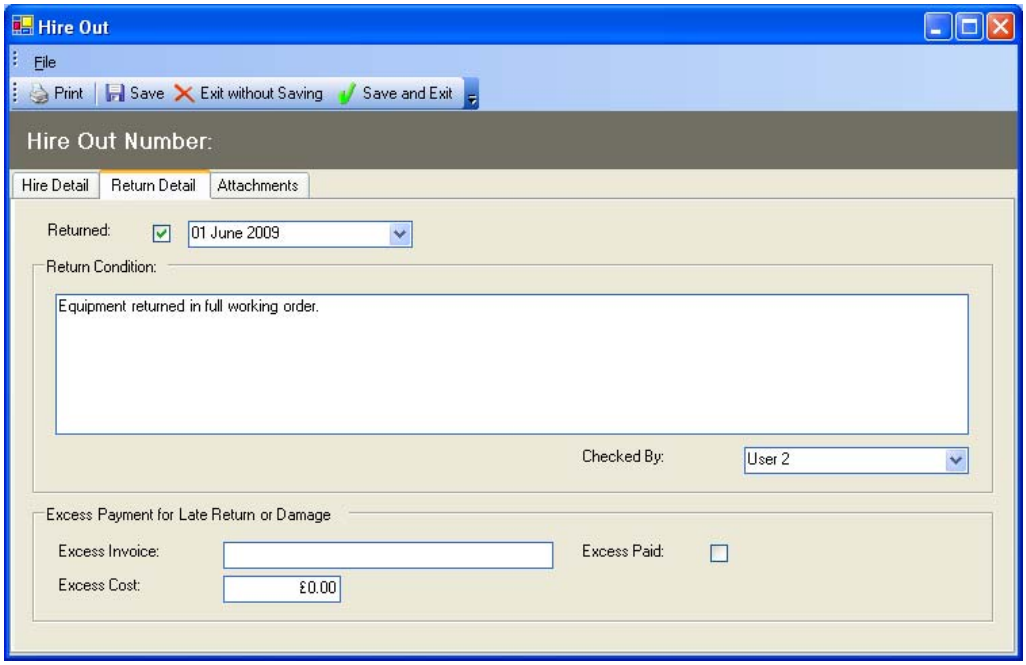
Within the company, there may items held which are cross hired to other companies. To manage the hire and return of an item, the “Hire Out” should be selected. This tab brings up the following window:



When the equipment is due to be hired, a new record is added to the "Hire Out" log by selecting "Add Record". This will bring up a new window. Details such as the hire out cost, date for return, purchase order number (and invoice number, if known at this stage) should be entered. It is also important to state who will be responsible for managing the hire out. The name of the responsible person is selected using the drop down arrow.



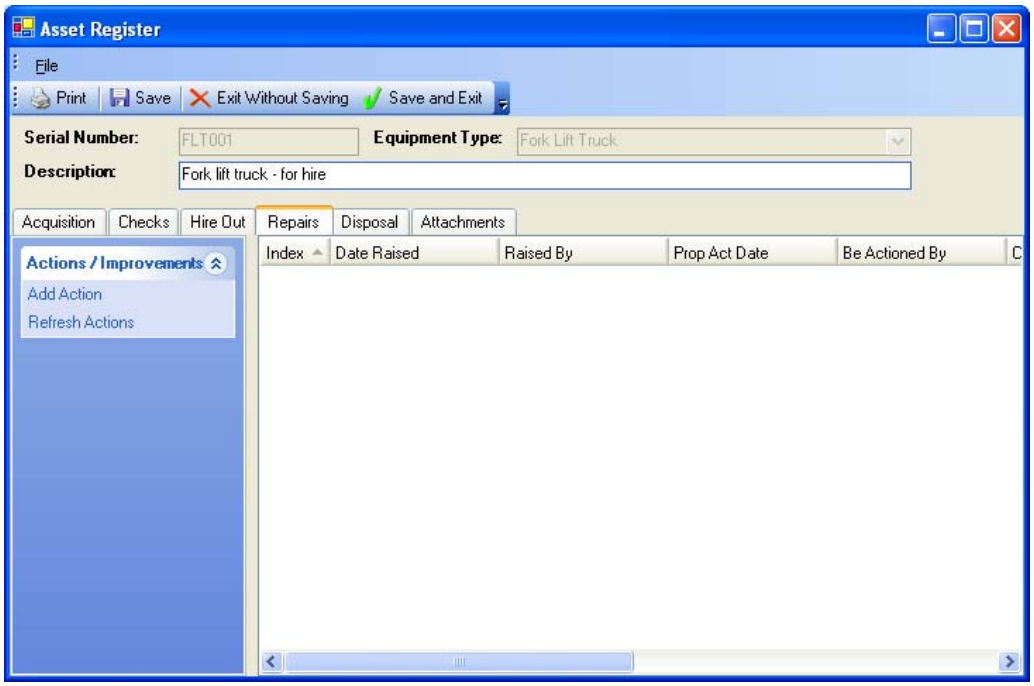
When the equipment is returned, the "Return Detail" tab should be selected and the relevant fields completed.



If the equipment was damaged upon return, it is possible to add details of the excess paid by the customer in compensation for the damage.

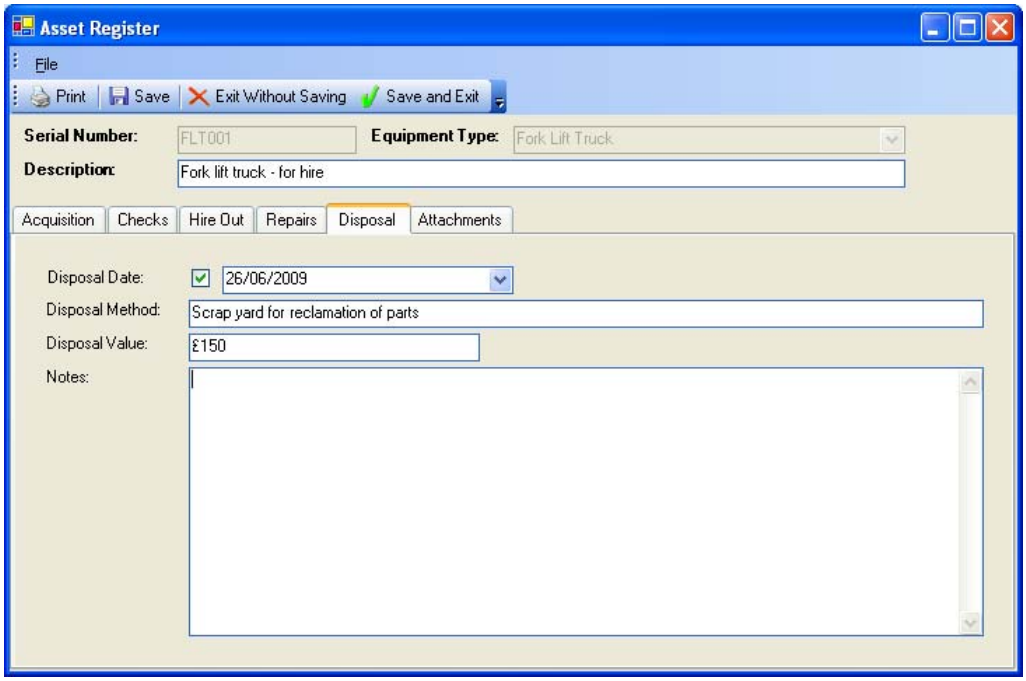
Repairs

When an item of equipment develops a fault an action should be logged to resolve the fault. The action is logged via the “Repairs” tab and the action added in accordance with the guidance on “Actions / Improvements”.



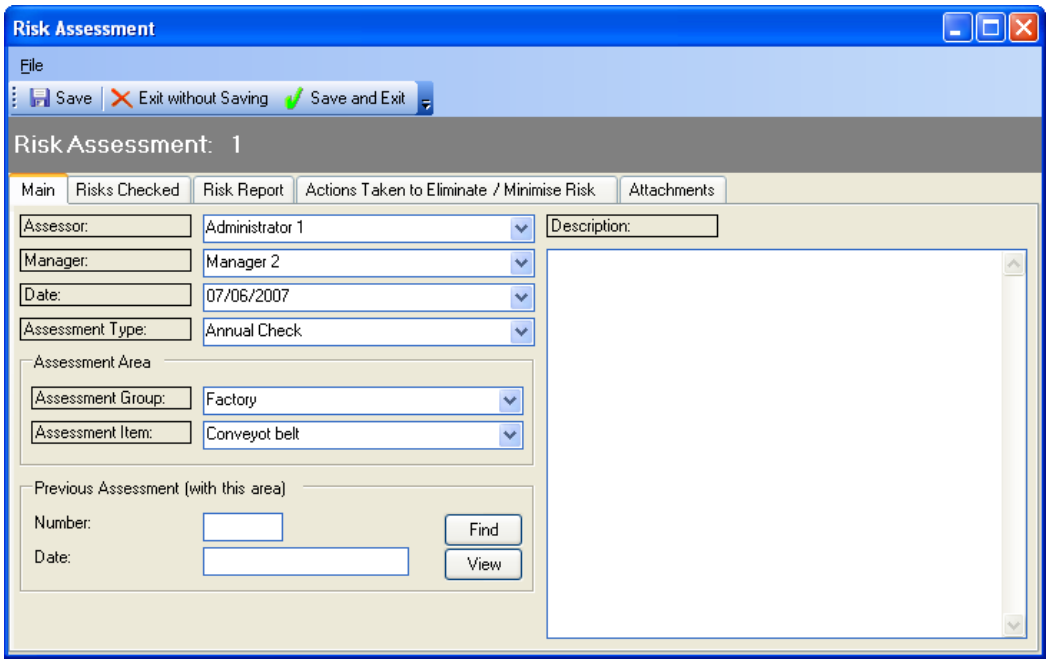
Disposal

When it is necessary to dispose of or recycle an item of equipment, the “Disposal” tab should be completed. This maintains a full history of the equipment from purchase to disposal. The date and method of disposal should be added to the record.



5.2.1.13. Risk Assessment

This area can be used to manage the Risk Management Process. The first popup that appears when you select the “Add” tab is:



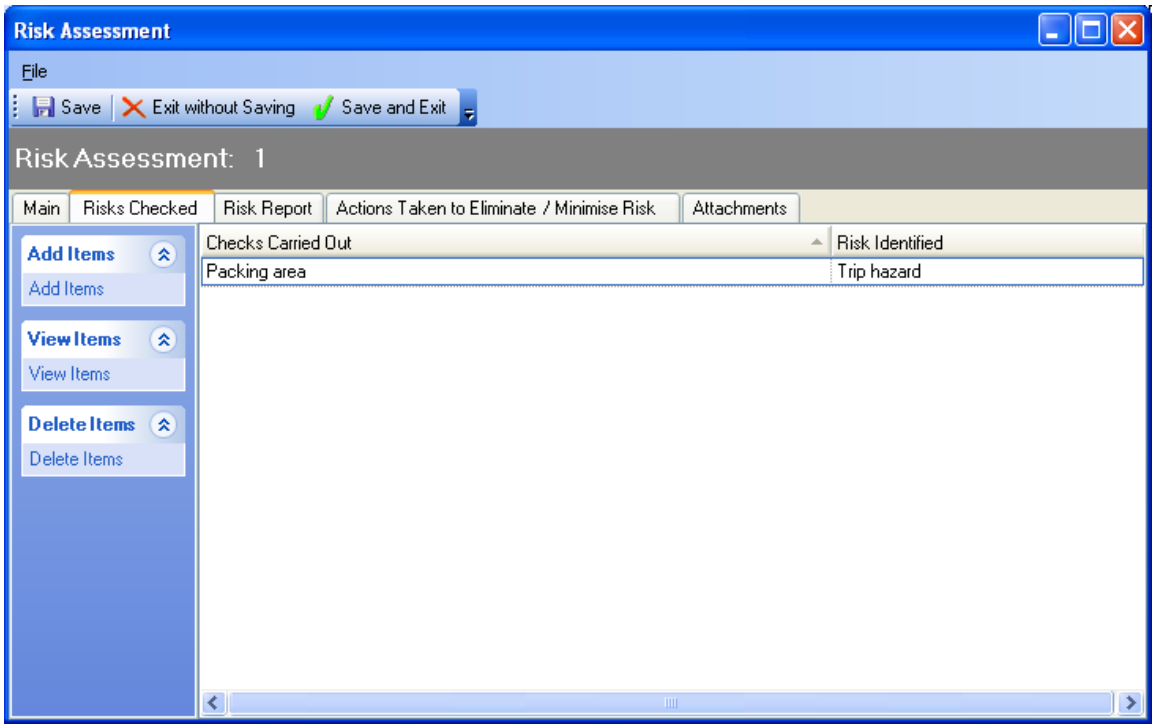
The criteria for the Risk Assessment should be selected using the various drop-down lists and the Assessment Area assigned. The Assessment Area allows the general and specific assessment areas to be input, e.g.

- Assessment Group: Factory A
- Assessment Item: Machine 1
  - Risk of Trapped Fingers
  - Risk of Slipping on waste generated by machine

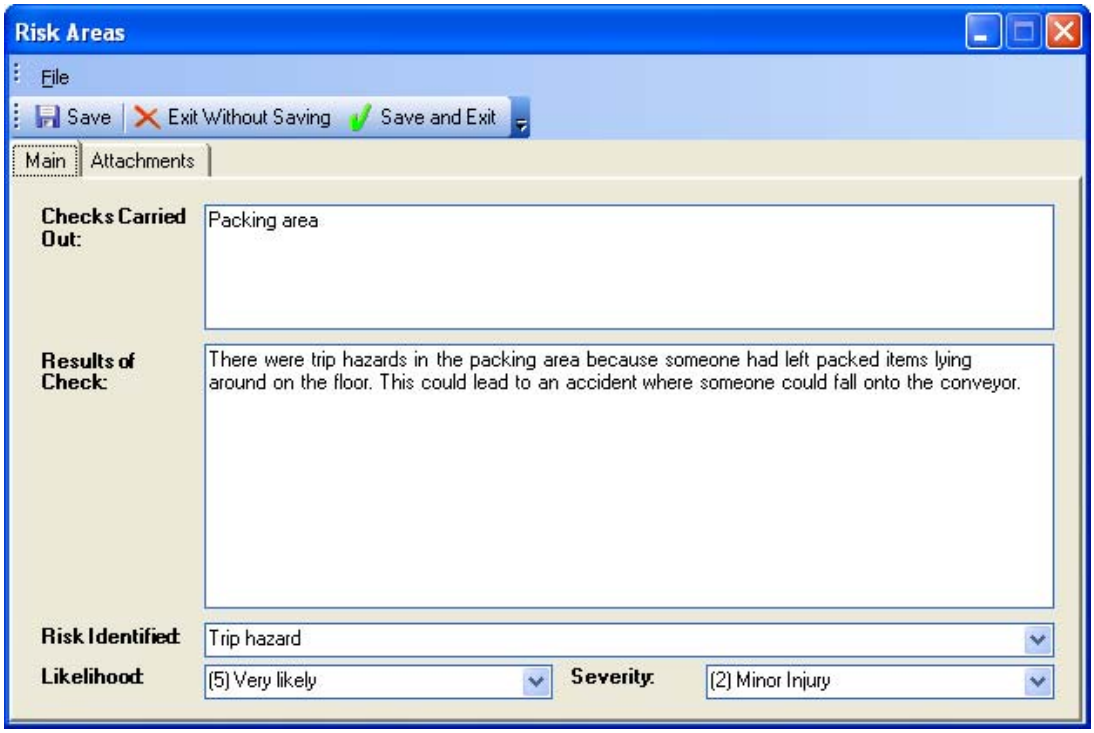
If there are previous records of risk assessment for this risk area, the ID number and date may be entered, "Find" selected and the records can be viewed. A description of the nature of the risk assessment can be entered in the box marked "Description".

Risks Checked

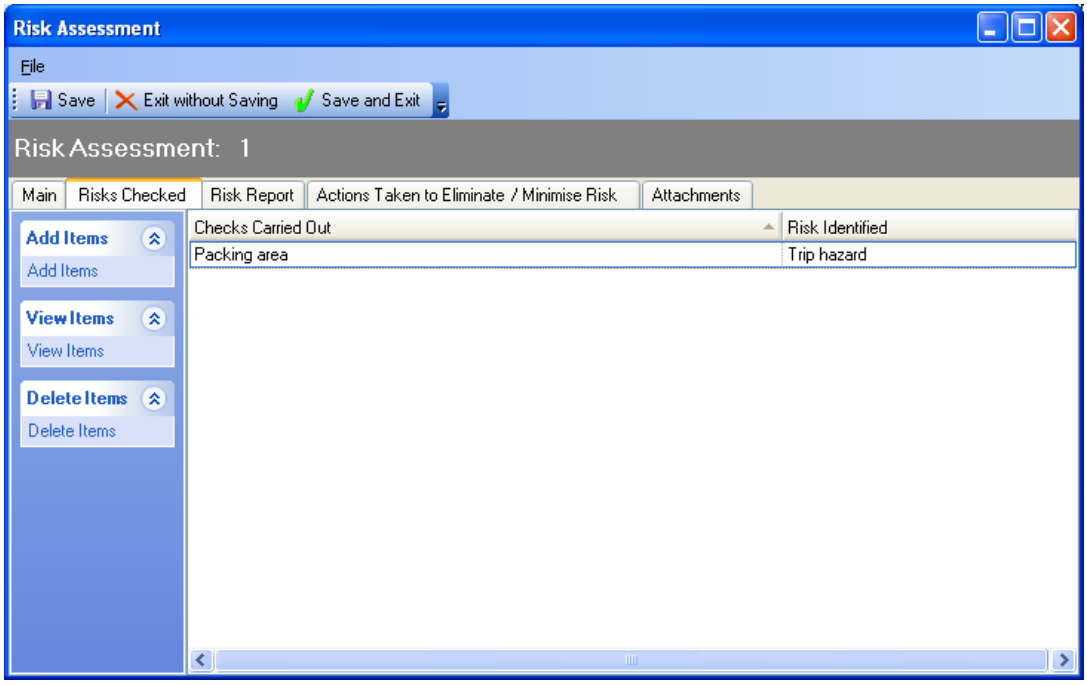
Selecting the Risks Checked tab will bring up the following screen:



The risks relevant to the risk assessment may be included within the list by selecting the "Add Item" button on the Explorer Bar. By selecting the checks to be carried out, e.g. packing area, a new window will appear, as shown below.



A summary of the results of the check should be input and any risks identified, e.g. trip hazard. The likelihood and severity of such an occurrence should then be established and selected using the drop-down boxes. Saving the entry will add it to the Risks Checked list as shown below:

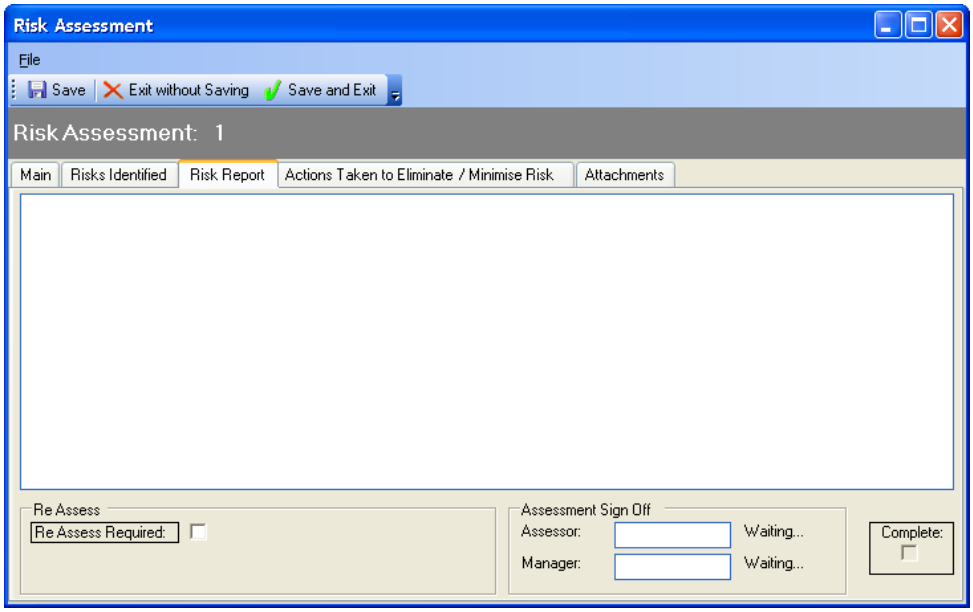


The process may then be repeated for each risk item in the risk group.

It is also possible to view or delete items by selecting the appropriate button on the Explorer Bar.

Risk Report

Selecting this tab brings up the following information:

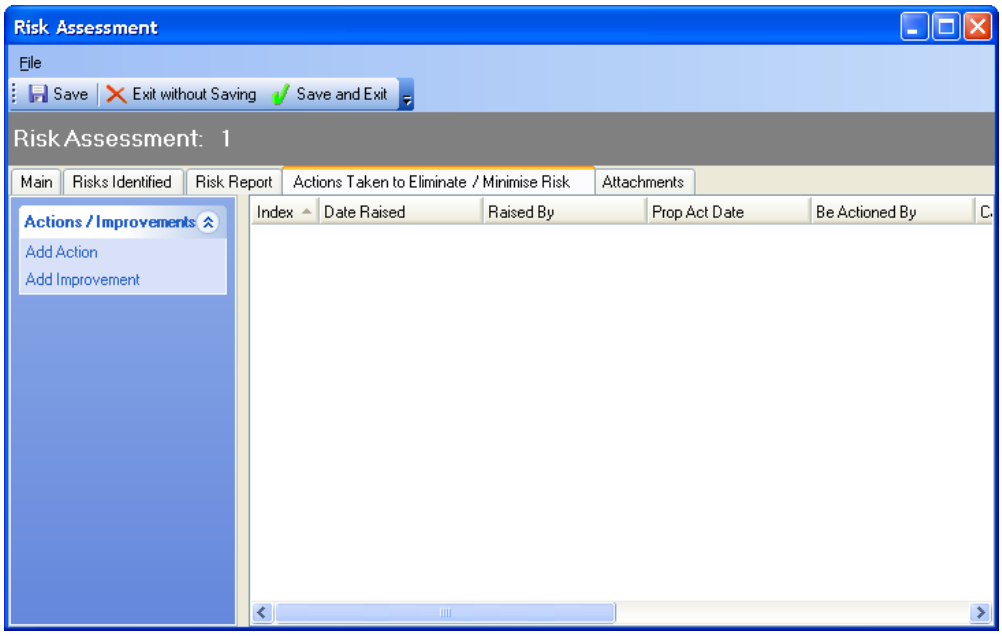


A full report of the risks identified for the risk group is presented in this area and must be signed off by the Risk Assessment Assessor and the Manager of the Department.

If re-assessment of the risk(s) is required the “Re-Assess Required” box should be ticked. When a new risk assessment is added to the Data Centre a default period for re-assessment of one year is set.

Actions taken to eliminate/minimize the risk

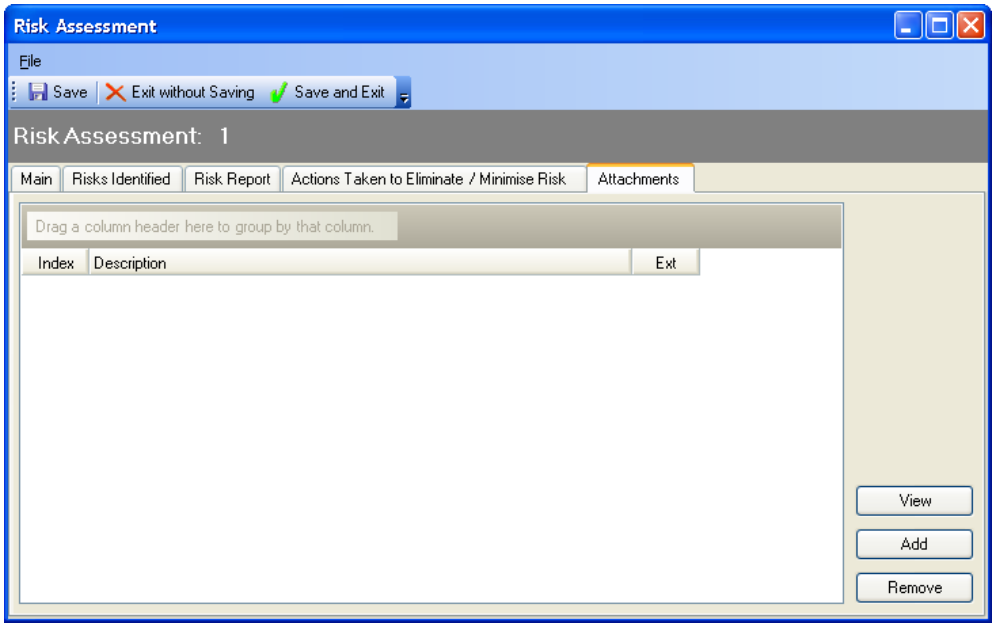
Actions should be raised, where applicable to reduce or minimize the risk identified. Selecting this tab will bring up the following screen:



Actions and Improvements are raised in the same way as in other records in the Data Centre.

Attachments

Relevant documents, e.g. health & safety reports, photographs, may be added to this tab, which appears as follows:



The functionality for these buttons is described in the "Attachment Tabs" section for the Data Centre.

5.2.2. Subrecords

Subrecords are created to ensure standardization of certain information that will be held in certain Records in the management system. For example, it is essential that everyone using the system refers to the same Department using the same words. If, for example, someone were to use the name “Procurement” instead of the “Purchasing” department, reports pulled up on the Purchasing Department would be incomplete; the Purchasing Manager would not be able to access the User Centre for personnel assigned o the Procurement Department, etc. Therefore, many items used in the Records are actually drop-down lists of confined to certain parameters.

However, these options need to be flexible to account for change within the company, i.e. a Departmental restructuring. Therefore, they are available for editing within the Subrecords area. They can only accessed by someone with Administrator privileges. When it is necessary to change a subrecord, e.g. job title, the Administrator should select the subrecord name and right click. A pop up menu appears with the option to “Edit” that subrecord. The subrecords with this “Edit” function are as follows:

- Departments
- Job Titles
- User Types
- User Breakdown
- Training Modules
- Required Modules
- Competency Levels
- Required Competencies
- Trainers
- Supplier Fault types
- Supplier Approval Grades
- Customer Complaint Types
- Cause Codes
- Standards
- Equipment Types
- Type of Check
- Check Frequencies
- Check Groups
- Audit Trail Results
- Meeting Types
- Meeting Tabs

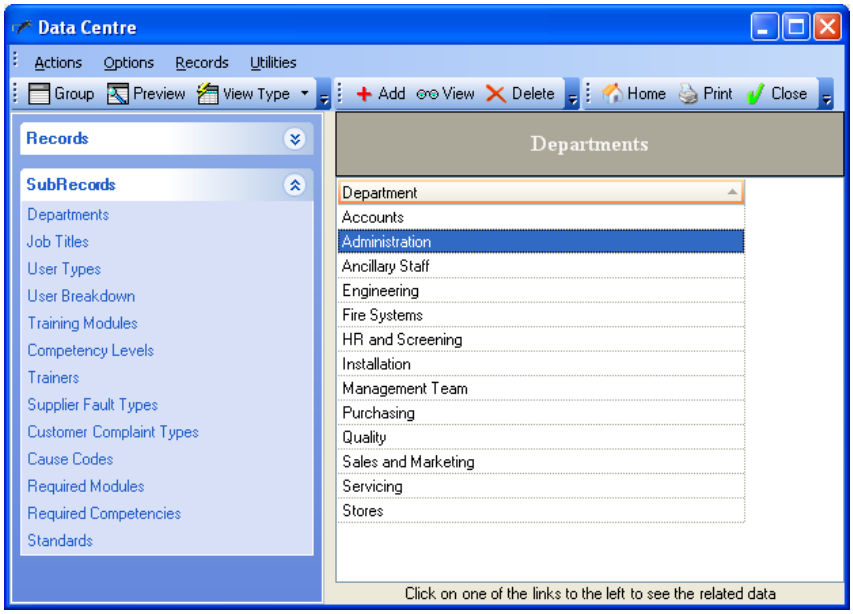
If an Administrator wishes to delete a subrecord they must confirm that they wish to proceed with the action.

The functionality of the Toolbar is as described at the start of the Data centre. Note the differences when “Adding Items” between Records and Subrecords. When the “Add” button is selected to enter a new subrecord there is a button called “New”. This acts as “OK” but also allows the User to make further additions to the subrecord and clears the applicable data entry areas. It is applicable to the following subrecords:

- Departments
- Responsibility and Authority Areas

- Job Titles
- Job Title Responsibility and Authority
- User Responsibility and Authority
- User Types
- User Breakdown
- Training Modules
- Training Groups
- Training Groups Links
- Required Modules by Job Title
- Required Modules by User
- Competency Levels
- Required Competencies
- Trainers
- Supplier Fault Types
- Supplier Approval Grades
- Customer Care Ratings
- Customer Care Types
- Cause Codes
- Standards
- Equipment Types
- Type of Check
- Test Frequency
- Check Groups
- Audit Trail Department Items
- Audit Trail Process Items
- Audit Trail Results
- Meeting Types
- Meeting Type Tabs
- Risk Groups
- Risk Items
- Risk Links
- Risk Assessment Types
- Risk Likelihood
- Risk Severity
- Risk Identified
- Process Tree

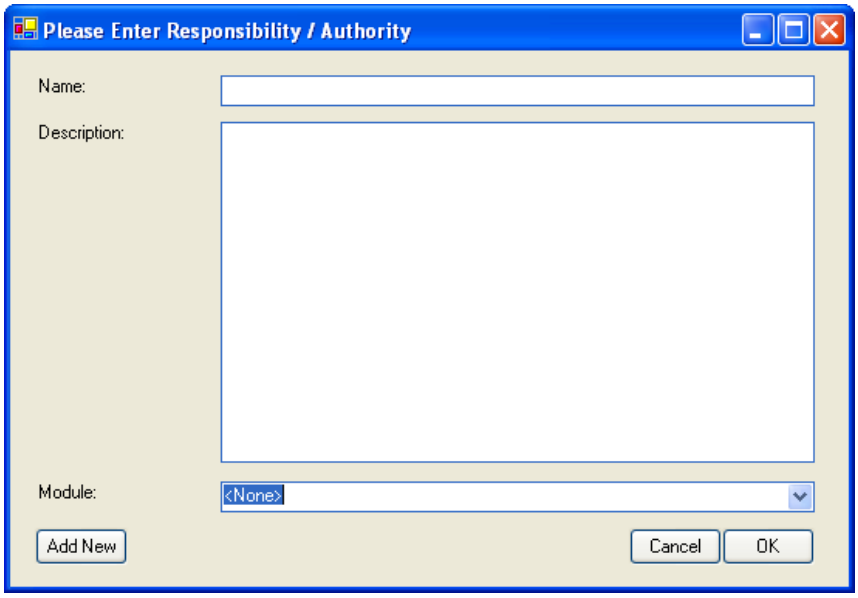
5.2.2.1. Departments



This Subrecord stores the names of all the departments in the company. Each Department should have a Manager assigned to it in the User Centre. When details are amended via the "Edit" function the department registered for each user is automatically updated in the User Centre. It will also automatically update the Departmental responsibilities so that a Manager does not lose access to their department's records. However, it will not alter Internal Audit Records because these are historical records.

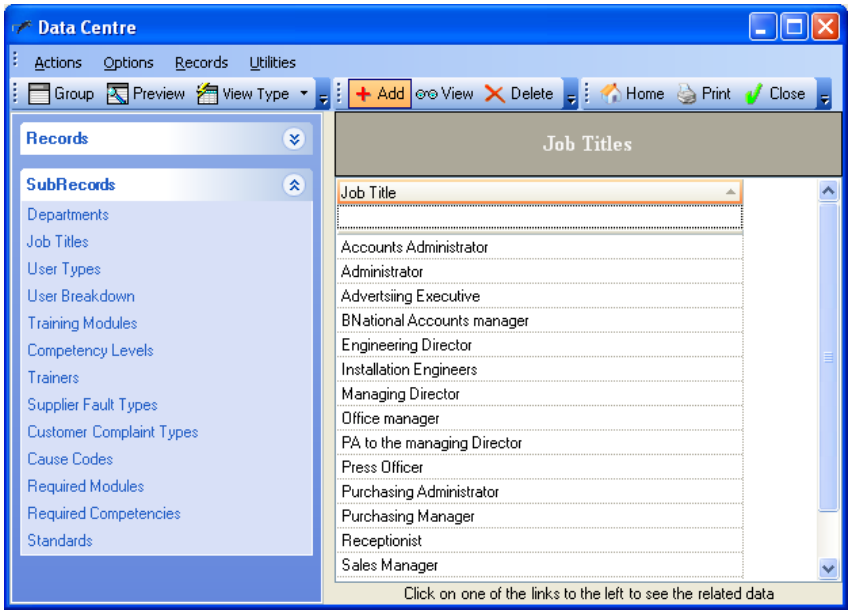
5.2.2.2. Responsibility and Authority Area

This subrecord stores the names and a description of areas of specific responsibility or authority within a company. It is possible to associate a training module with the specific responsibility or authority area, as appropriate. A training module is selected from the drop down box shown in the image below.

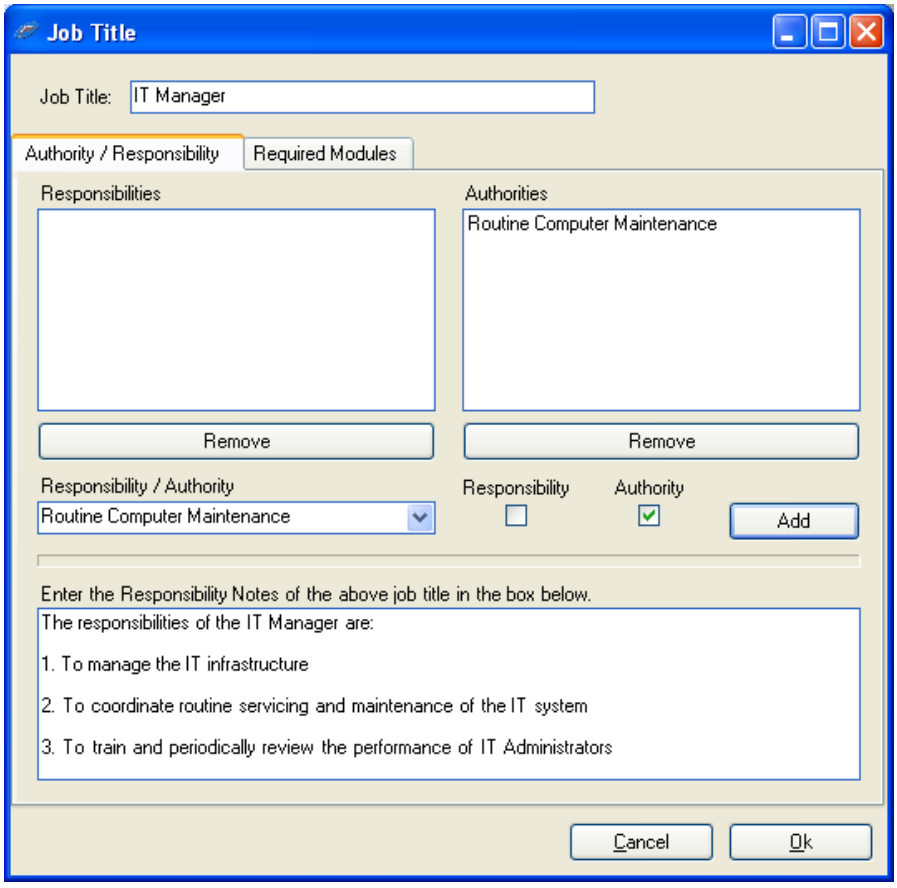


5.2.2.3. Job Titles

This Subrecord stores the names of all the Job Titles that can be quantified within a company.



Once the Job Titles have been added, highlighting the required job title and right-clicking brings up a menu from which “Edit Job Responsibilities” can be selected. This enables the User to create or amend the responsibilities for that Job Title in the Responsibilities and Authorities dialogue box that appears. It is also possible to associate required training modules, as appropriate.



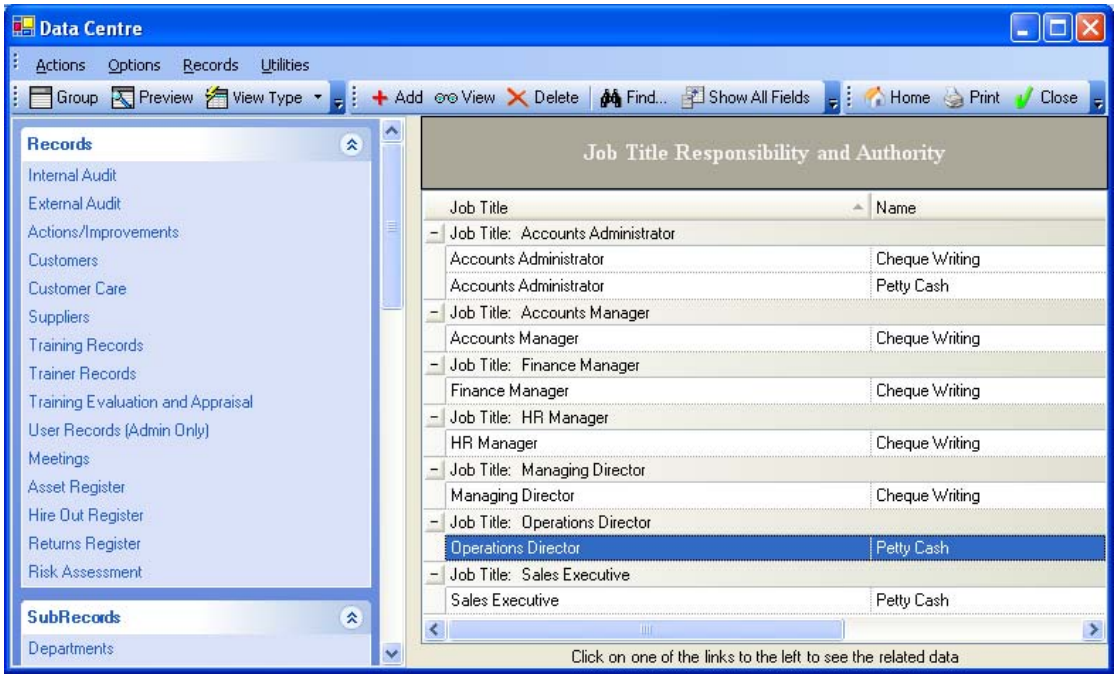
Entering data in this dialogue box makes it available in the User Centre. When an employee has been allocated a Job Title, the "Responsibilities" field is automatically populated with this data. Once entered, this data can be amended by hand. If changes to the Responsibilities for a given Job Title are permanent and affect all personnel with that Job Title, the Subrecord should be changed by an Administrator.

Dolphin will automatically update the User's job title so that each user is linked to the correct job title. It will also automatically update the "Required Modules" subrecords so that the links to the required modules are unchanged for each user. However, past Evaluation & Appraisal records are unchanged because these are historical records.

When a User highlights a Job Title and clicks "View" or double-clicks the Job Title a "Job Title Dialogue Box" appears. It is then possible to alter the Job Title recorded.

5.2.2.4. Job Title Responsibility and Authority

Following the addition of areas of responsibility and / or authority to the subrecords it is possible to associate these areas with job titles. A job title may have more than one area of responsibility. This is shown in Dolphin via a '+' symbol, which indicates more than one area of authority or responsibility is listed against the job title.



When the responsibility or authority area is added to the job title, it will automatically add the corresponding training module to that required training modules by job title list. This ensures that all personnel undertaking the new of responsibility in accordance with their role may be trained and signed off as competent in this new area of responsibility before taking on the role.

5.2.2.5. User Responsibility and Authority

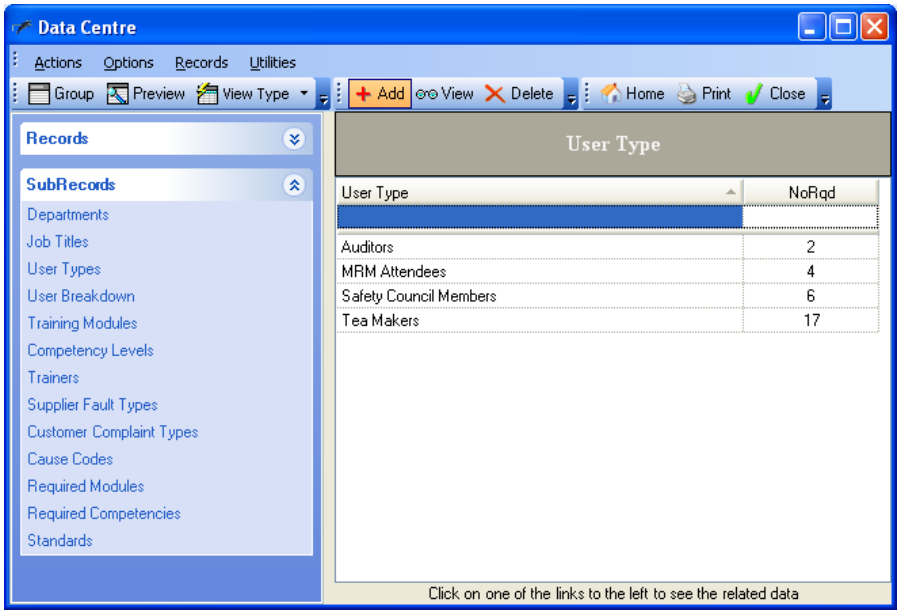
In a company it may be more appropriate to assign an area of responsibility or authority to an individual rather than a job title. This is possible via the User Responsibility and Authority

subrecord. A similar list to the one shown above will be generated. However, it will display the names of individuals instead of job titles.

When the responsibility or authority is added to the user, it will automatically add the corresponding training module to that user's required training modules list. This ensures that the user may be trained and signed off as competent in this new area of responsibility.

5.2.2.6. User Types

This Subrecord stores all of the User types or subgroups that are cross-departmental. The schedules for these various User groups are available in the Schedule Centre and the grouping is added simply by creating the group in this subrecord and allocating personnel to the group in the "User Breakdown" section.

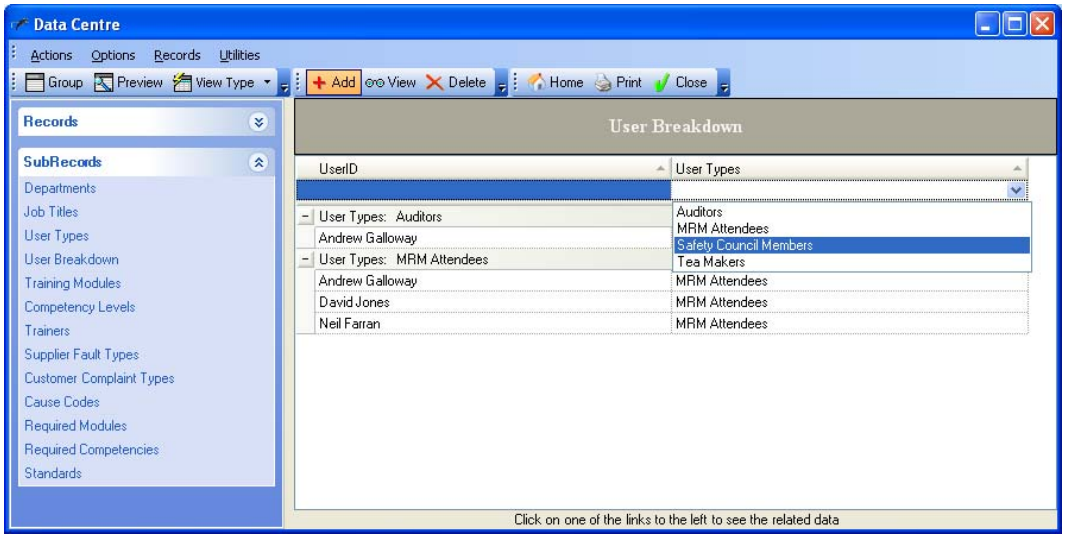


5.2.2.7. User Breakdown

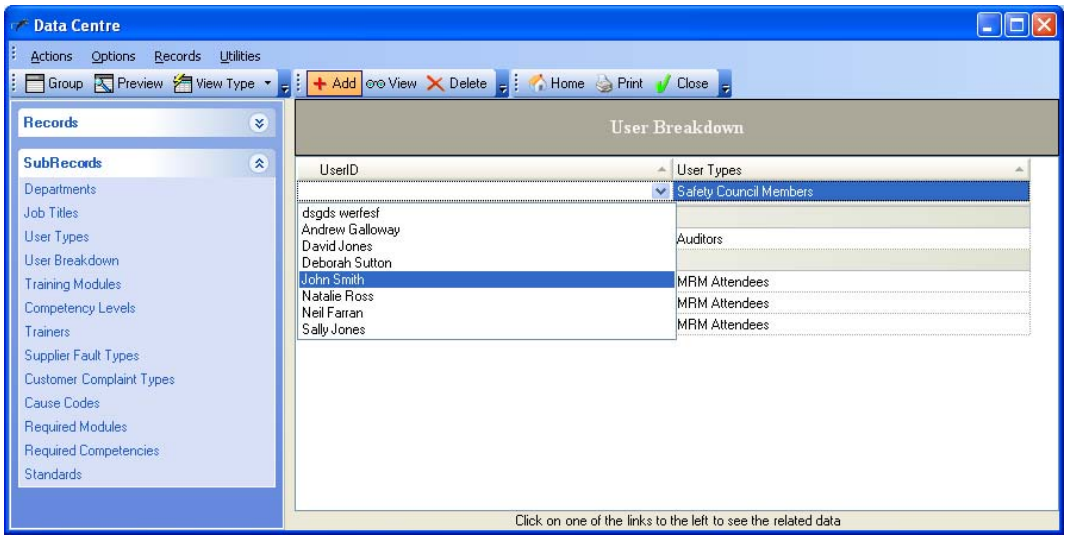
This Subrecord assigns Users to the different User Types. The schedules for these various User groups are available in the Schedule Centre and the grouping is added simply by allocating personnel to the groups created in the "User Types" section.

To add records, click on the "Add" button. The resultant "Add Line" appearing at the top of the list has two fields. One is for the "User Types" from a drop-down list and the other is for the personnel ("User ID"). Therefore, you can allocate various personnel to the groups and one member of staff can belong to several groups.

First select the User Type.



Then select the member of staff (“UserID”).



Then press “Enter” on your keyboard to write the information to the database.

If groups are deleted in the “User Types” section but they still have personnel assigned, the group will not be deleted. However, once all members of a group have been deleted, the group is no longer shown on the “User Breakdown” List.

Lists start off closed up and you must click on the little **+** symbol to open up the list.

5.2.2.8. Training Modules

This subrecord is one of the key areas within the Training System. Training Modules are either Internal or External courses. For Internal Courses, there needs to be a Training Module document in the “Docs” subfolder. Ideally, it should also be linked in the IMS Centre and, if not done already, you will be prompted to do so as you add the document to the list of Training Modules in this subrecord.

For Internal Training Modules, there will be at least one member of staff assigned as the Trainer for that Module and there will be a Training Module recorded and controlled in the IMS Centre.

For External Training, there needs to be a placeholder document in the “Docs” subfolder. This may be a document in the “Docs” subfolder that simply states “This course is provided by AnyCo Training Services”. Alternatively, it may be the prospectus, course description or joining instructions provided by the external training agency. This enables the functionality of the Training Records to be used with External Courses in the same way that it is for Internal Courses.

In this Subrecord, we register the Training Module or the placeholder document as a Training Module and link to the relevant document that is stored in the IMS Centre or the “Docs” subfolder. If the relevant document is not assigned to the IMS Centre, you will be asked whether you want to do that as you register the Training Module. You must say yes to this, as all Training Modules must be registered in the IMS Centre.

Right-clicking on a highlighted module will bring up a menu, from which “Edit TM document” can be selected. This opens the related document in the IMS Centre where it can be edited, if you have the correct privileges.

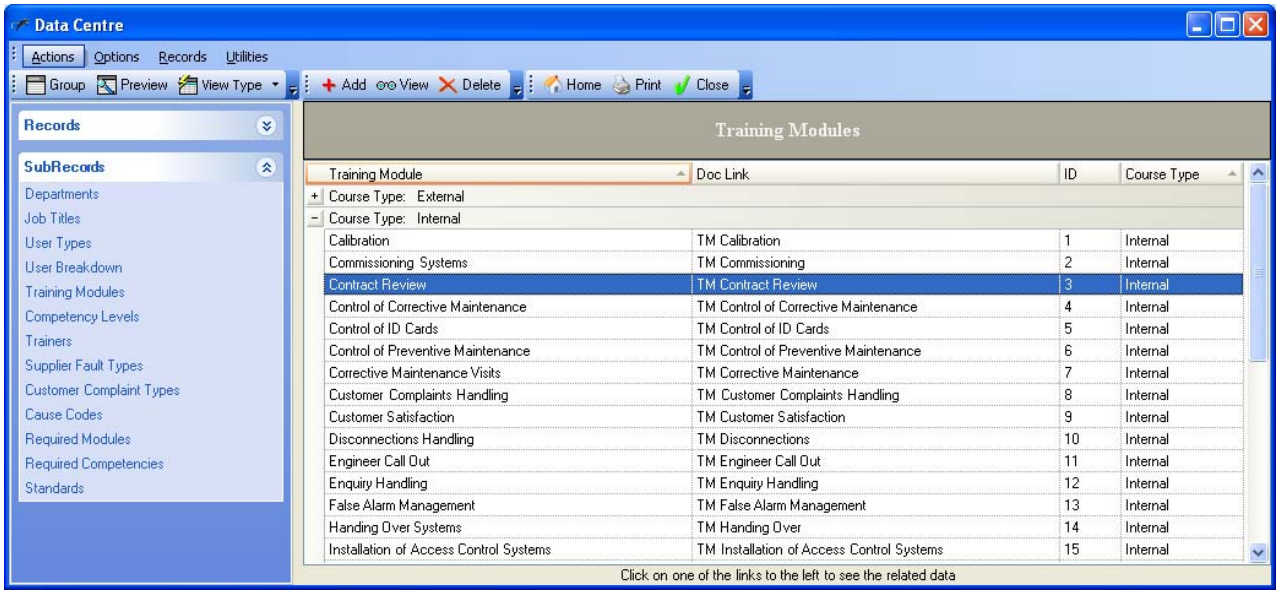
Additionally, by double-clicking an entry or selecting from the list and pressing the “View” button a Training Module Dialogue box appears. It is then possible to edit the following data:

- Course Name
- Document Link
- ID
- Internal/External
- Required by all

If amendments are made to a training module name Dolphin will also amend the name in the following areas so that the links are maintained:

- Trainers
- Required Modules
- Required Competencies
- Training Records
- Evaluations

This Subrecord is a drop-down item within the Training Records.



Obsolete Training Modules

Right clicking on a training module now gives the option of making that training module obsolete, which has the following effects:

- The User is informed how many unfinished modules will be affected
- The Training Module is deleted from all related Module records
- Dolphin gives the option remove the module from required modules database

It is possible to reinstate a training module, which removes the obsolete marker, by right clicking on the required training module and selecting “Reinstate Training Module.”

5.2.2.9. Training Groups

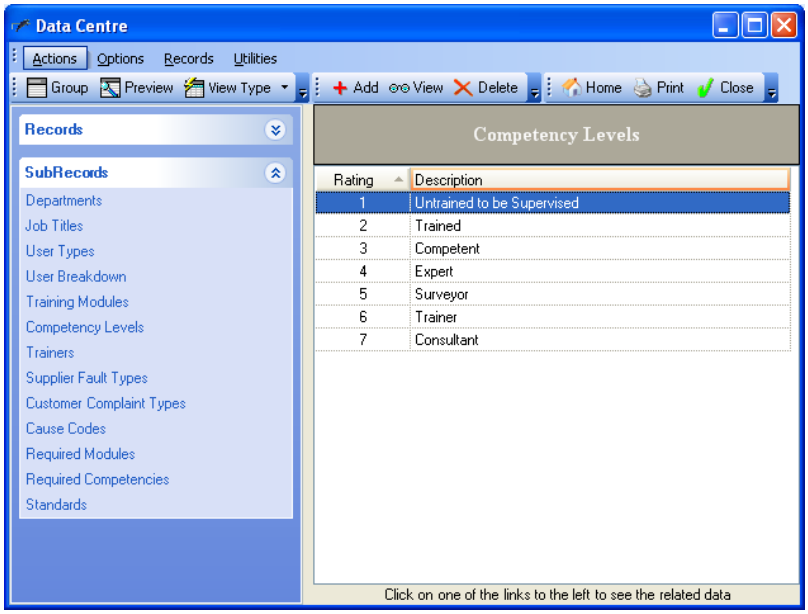
This subrecord allows an administrator to list training groups within the organisation. The use of this facility allows groups of personnel conducting the same function but with different job roles, e.g. handling customer complaints, monitoring customer satisfaction, answering telephone calls, etc., to undertake training as a group instead of individuals.

5.2.2.10. Training Group Links

This subrecord enables an administrator to assign relevant training modules to training groups.

5.2.2.11. Competency Levels

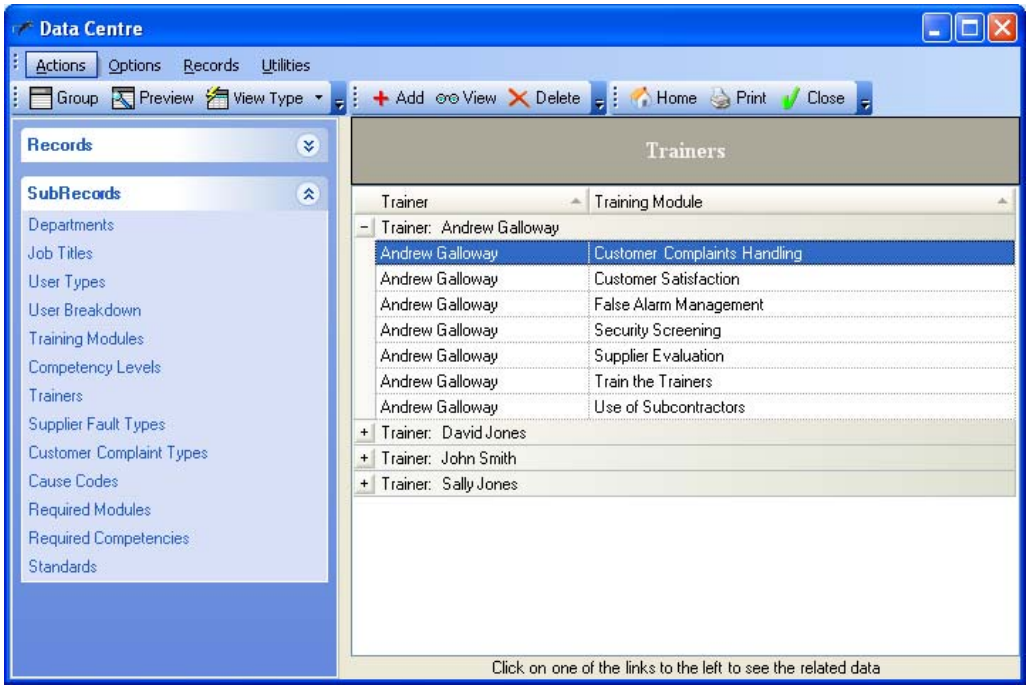
In this Subrecord, we determine the various skills levels for the Training Modules. As a minimum, we need to differentiate between someone who is “Untrained” (the default), someone who is trained and someone who is competent. Apart from that, you can have as many levels of expertise as you need. This Subrecord is a drop-down item within the Training Records.



If the name of the Competency Level is amended via the "Edit" function, any associated training records are automatically updated to reflect the change and maintain data integrity.

5.2.2.12. Trainers

This Subrecord holds the information about who can train which Internal Training Modules. This Subrecord is a drop-down item within the Training Records.

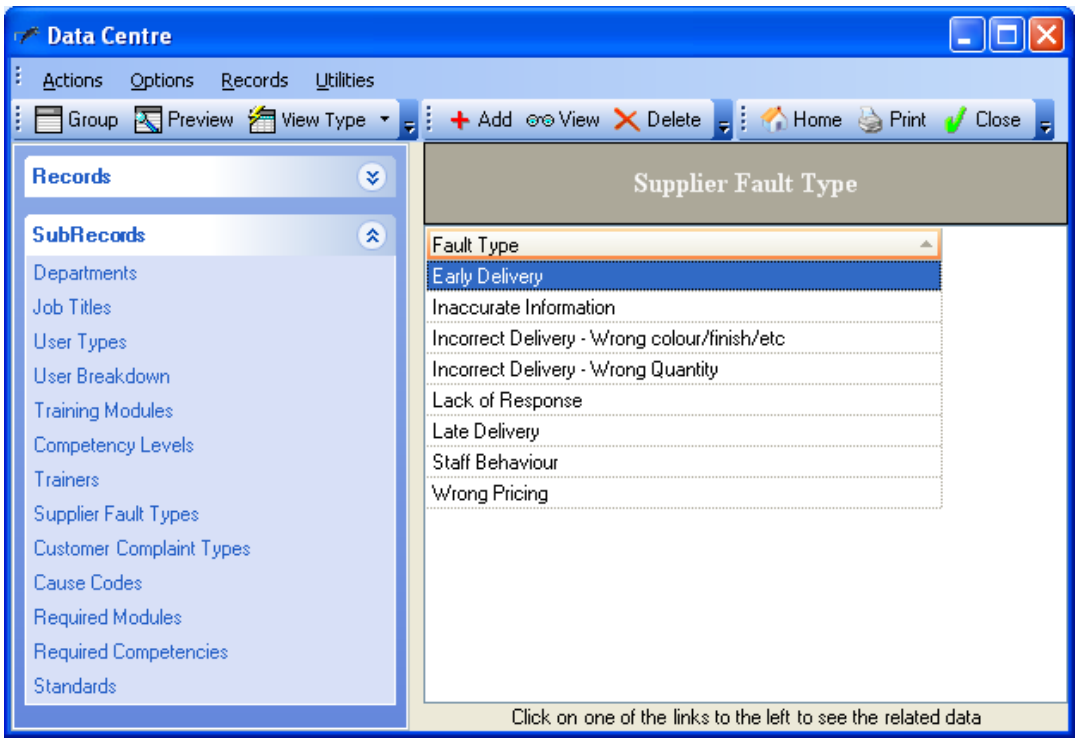


To add records, click on the "Add" button. The resultant "Add Line" appearing at the top of the list has two fields. One is for the "Trainer" from a drop-down list and the other is for the "Training Module". Therefore, you can allocate various Training Modules to a member of staff. First select the Trainer then select the Training Module then press "Enter" on your keyboard to write this information to the training database.

Lists start off closed up and you must click on the + symbol to open up the list of Training Modules allocated to that Trainer. This list also appears on the "Internal Trainer" panel on the Training Tab within the User Centre.

5.2.2.13. Supplier Fault Types

This Subrecord stores all of the Supplier Fault Types, Late Delivery, Damaged Goods, etc. These fault codes will be used in the "Supplier Records" and will be reviewed at Management Review.

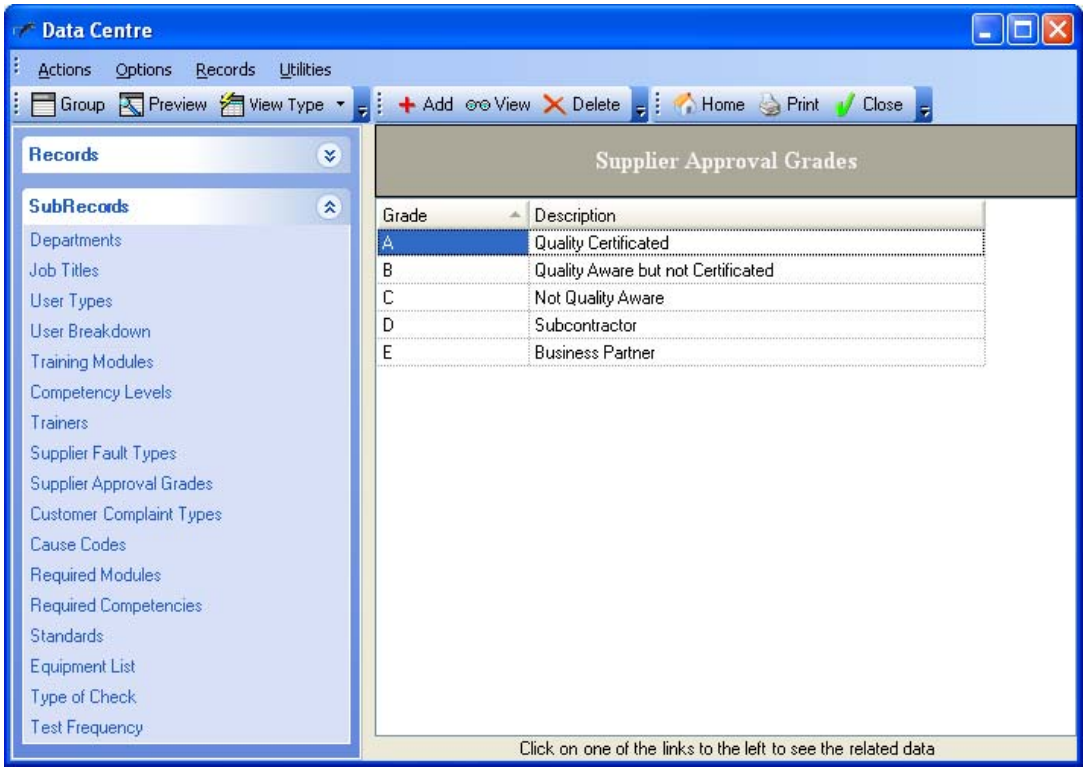


5.2.2.14. Supplier Approval Codes

This subrecord will be used in the "Supplier Records" to determine which of two otherwise similar organizations should be used as the supplier for a given job. In essence, the higher rating supplier should get the job, if everything else is equal.

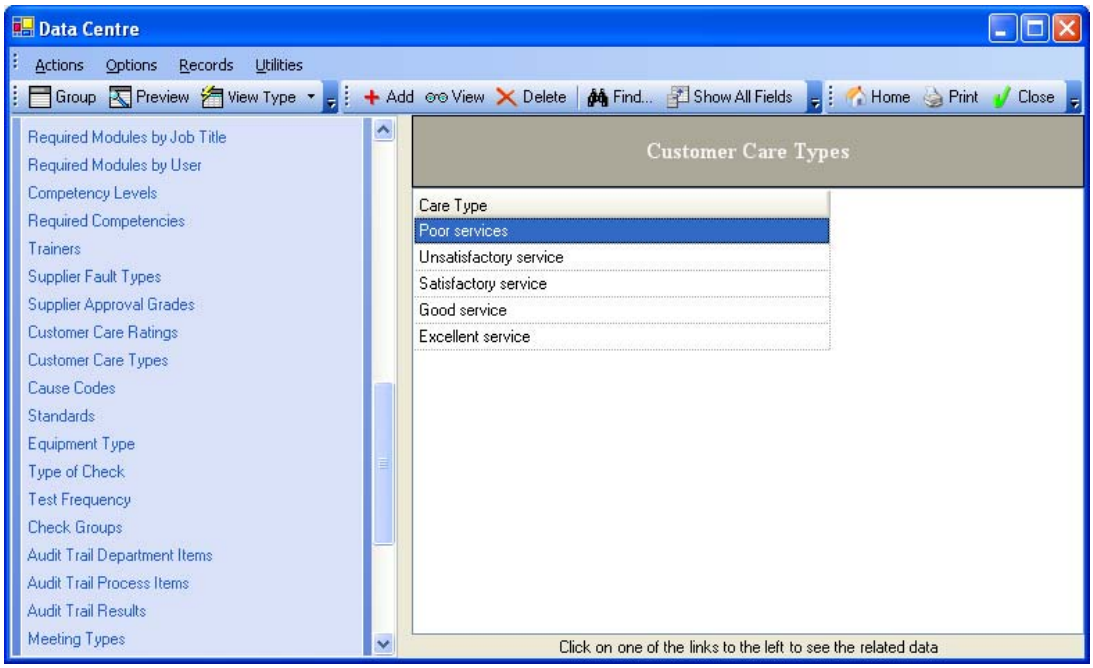
Supplier's Approval Codes can be modified based on good or poor performance. For example, a supplier may be awarded the accolade of "Preferred Supplier" and this can be added to the "Approval Codes" then allocated to that Supplier under the "Supplier Records". Other categories may be "Only as a Last Resort", "Bank Holidays Only", "Quality Aware", etc.

Decisions to upgrade or downgrade a Supplier are normally made at a Management Review Meeting or as the result of a complaint against a Supplier.



5.2.2.15. Customer Care Types

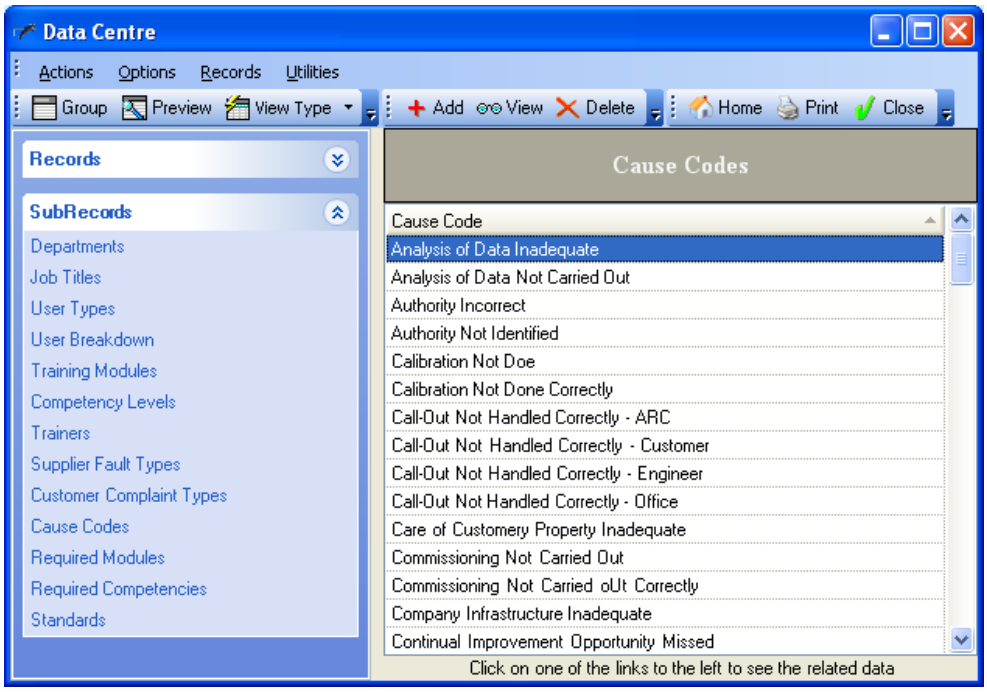
This Subrecord stores all of the Customer Care Types. If a satisfaction level is selected that has a tick in the “Gen Imp” field, an Action or Improvement will be generated automatically. These items are found in drop-down lists in the Customer Care Records.



If a change is made to a customer complaint type via the “Edit” function then the Customer Care Record is also updated to maintain data integrity.

5.2.2.16. Action or Improvement Cause Codes

This Subrecord contains the Action or Improvement Cause Codes used on the Close Out tab of the Actions or Improvements form.

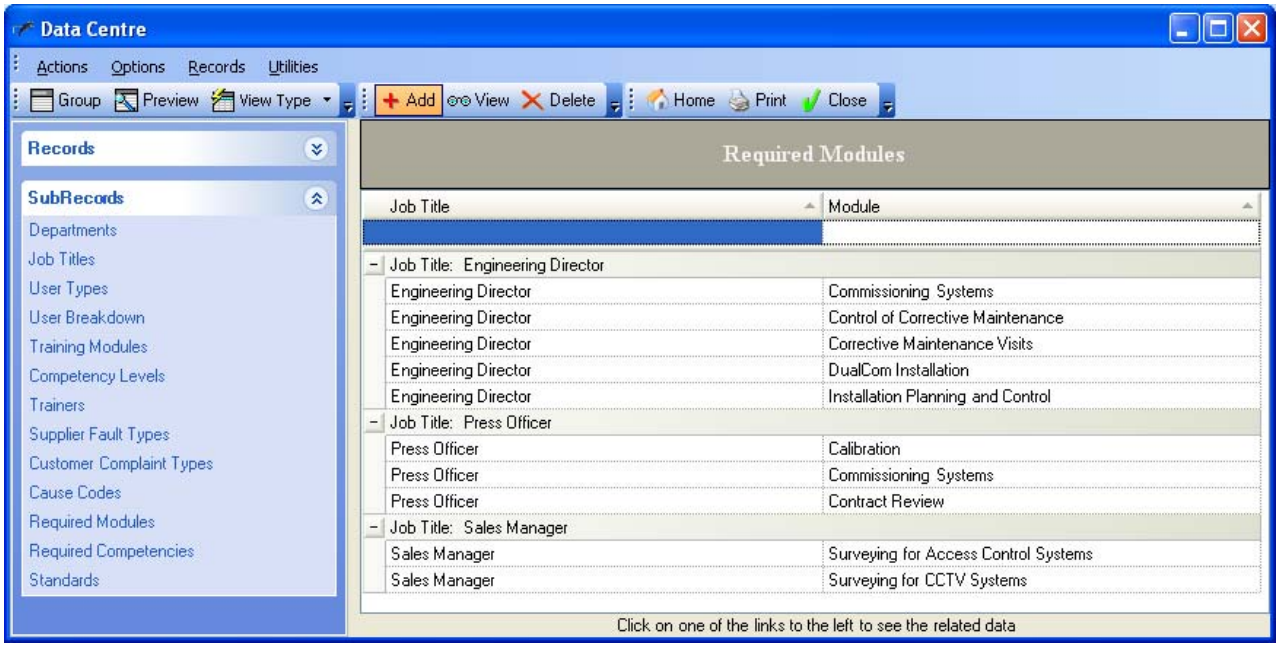


If a cause code is modified / renamed via the “Edit” facility then the Customer Care Record is automatically updated to maintain data integrity. Also, the associated Action/Improvement is updated as well.

5.2.2.17. Required Modules by Job Title

These Subrecords form part of the Training System set up. Training requirements are set against Job Descriptions. When a person joins the company and is given that Job Title, Dolphin automatically assigns these Training Requirements to that new member of staff. This information is listed on the Training Tab in the User Centre. Dolphin will automatically check the required modules on entry to prevent duplication.

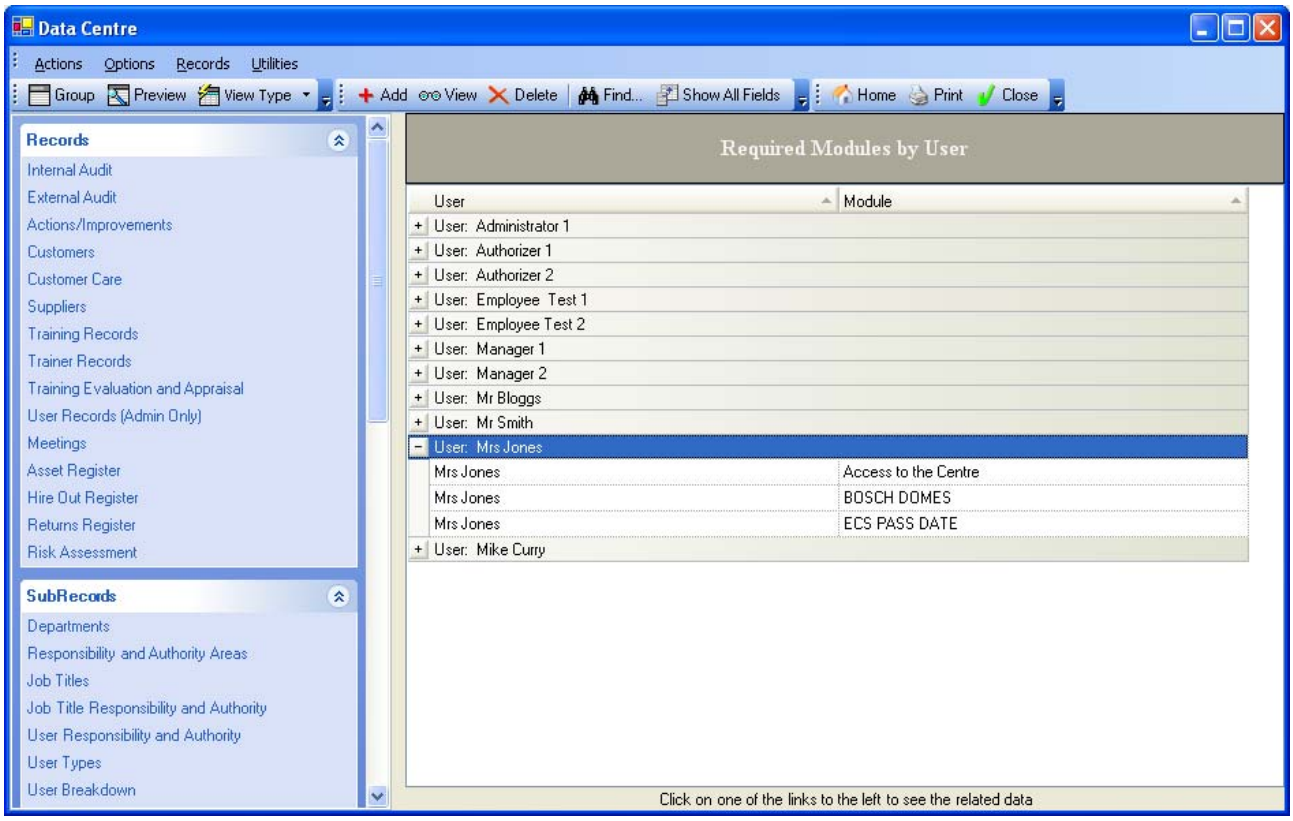
When a Required Module is allocated to a Job Title it is also automatically added to all Users with that Job Title. Therefore when a new training requirement is introduced for a specific role, Dolphin will identify all staff who need to be trained in the new module. Those requiring training will be identified via the Utilities function and “Missing Required Modules”.



5.2.2.18. Required modules by User

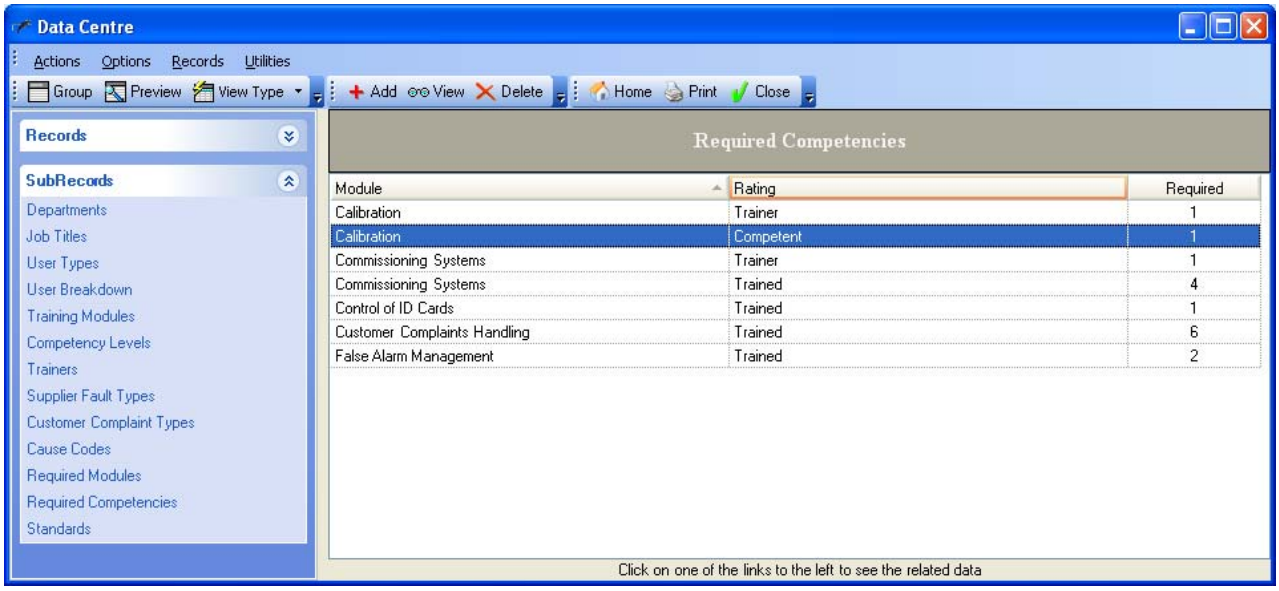
These subrecords form part of the training system. As stated above, when a person joins the company and is given that Job Title, Dolphin automatically assigns these Training Requirements to that new member of staff. This information is listed on the Training Tab in the User Centre. Dolphin will automatically check the required modules on entry to prevent duplication.

However, if a user requires additional modules that are not required by the standard job description, these may be added to an individual user. This will appear as shown below:



5.2.2.19. Required Competencies

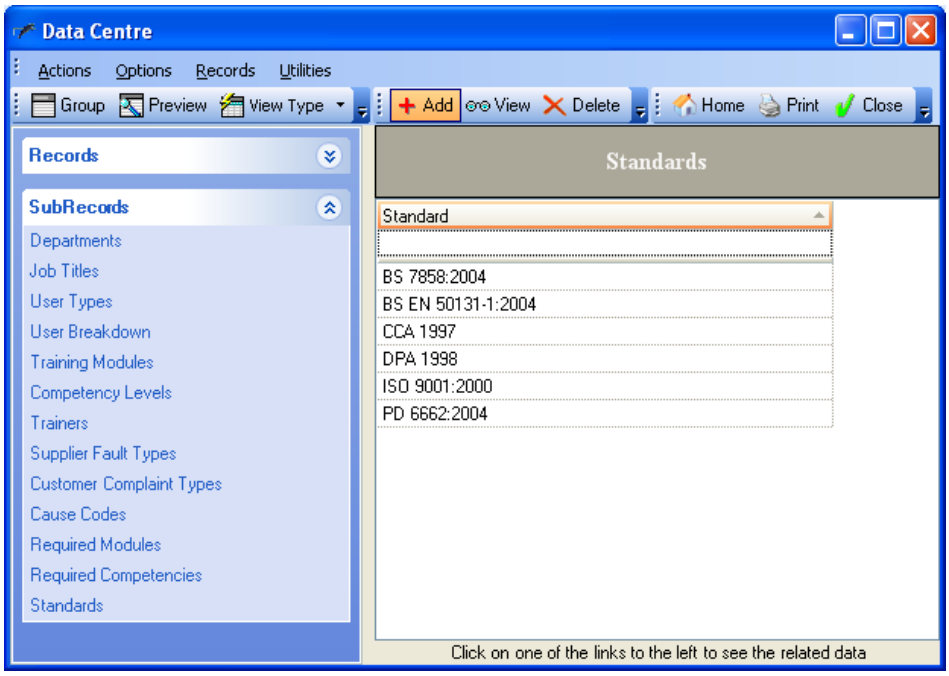
This Subrecord is used to pre-define critical staffing levels in key tasks (or all tasks if you want to). The information contained in this Subrecord should represent the absolute minimum skill set to allow the company to achieve its corporate goals.



Simply select the Training Module, the level of competence required for that task and the minimum number of personnel required for effectiveness. You can have tasks covered by different quantities of staff trained to different competency levels.

5.2.2.20. Standards

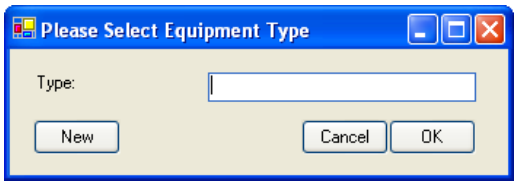
This Subrecord holds a list of all the externally produced documents in use in the company. The standards listed in this subrecord are linked to a copy of the relevant document in the IMS Centre. As well as a ready reference for auditing to ensure that the latest versions of the documents are held, the Subrecord is also required in the External Audit Report.



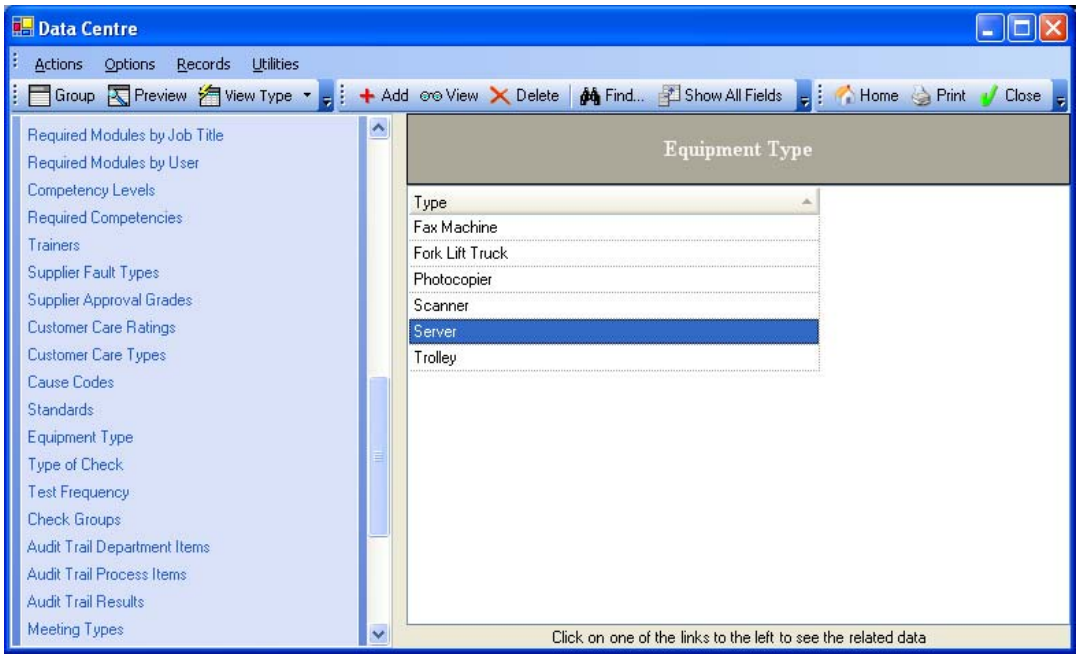
If a standard title is changed via the “Edit” facility it will not affect any previous internal or external records because these are historical records.

5.2.2.21. Equipment Type

New types of equipment are added in the subrecords section. The subrecords must be populated to allow management of the Equipment Checks in the Records Section. To add new equipment type the “Add” button should be selected and the following popup appears.



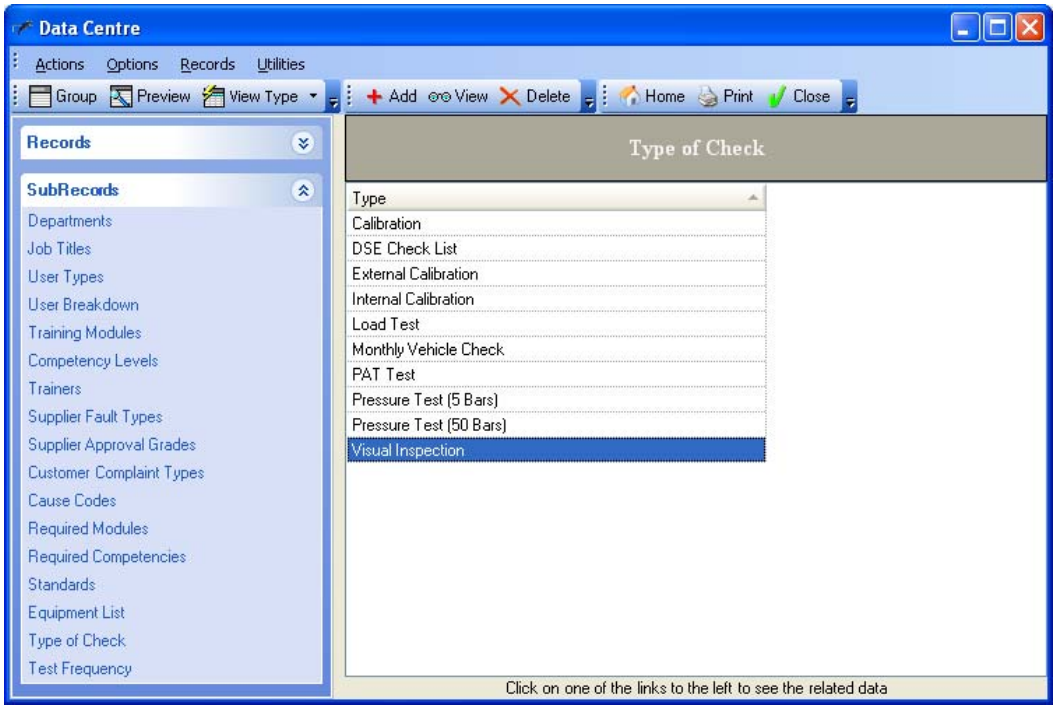
A list of equipment types is shown in the subrecord, e.g.



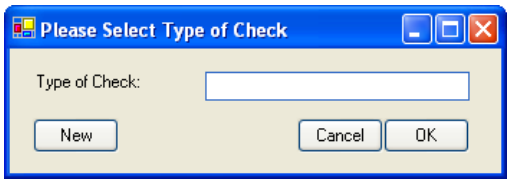
Note; when an item of equipment is deleted from the Equipment List all checks associated with the record, e.g. PAT, Visual, etc., are also deleted.

5.2.2.22. Type of Check

This subrecord is used to store the data for the “Type of Check” field used in the “Equipment Checks” records.



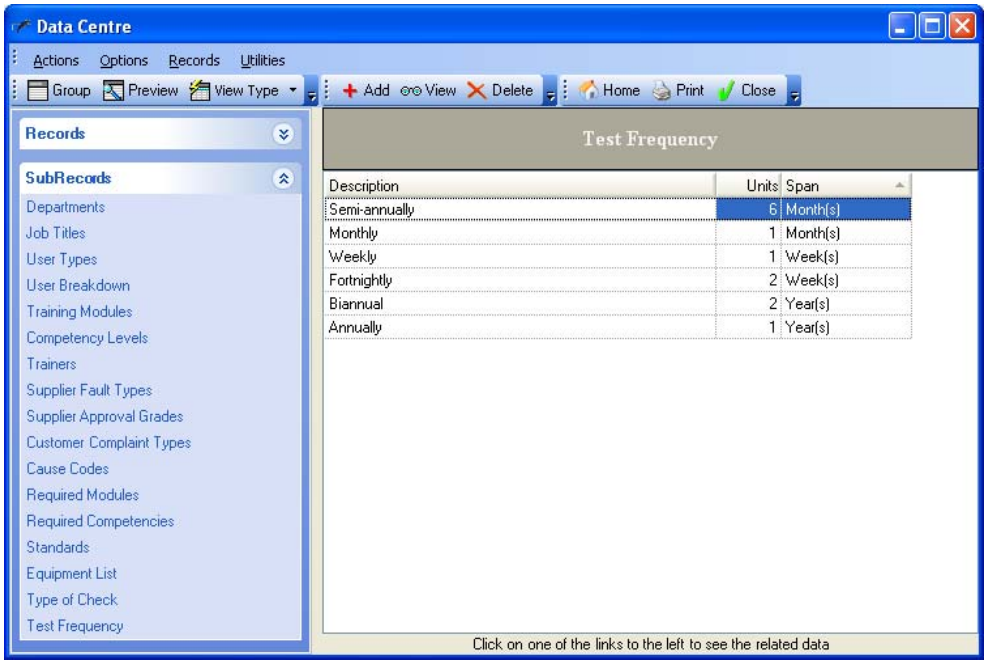
The type of equipment check may include, check oil, calibration, visual, check insurance, PAT test, etc. As described for the Equipment Type subrecord the “Add” button is selected and the relevant details entered.



5.2.2.23. Test Frequency

This subrecord is used to store the data for the “Test Frequency” field used in the “Equipment Checks” records. The Administrator can create any periodicity using a combination of “Units” i.e. quantity and “Span” i.e. common time periods.

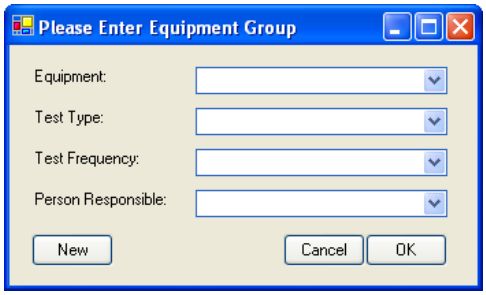
The frequency of testing may be daily, weekly, monthly, etc. When the frequencies have been set, Dolphin will display the number of units to be tested and the frequency of testing as shown below.



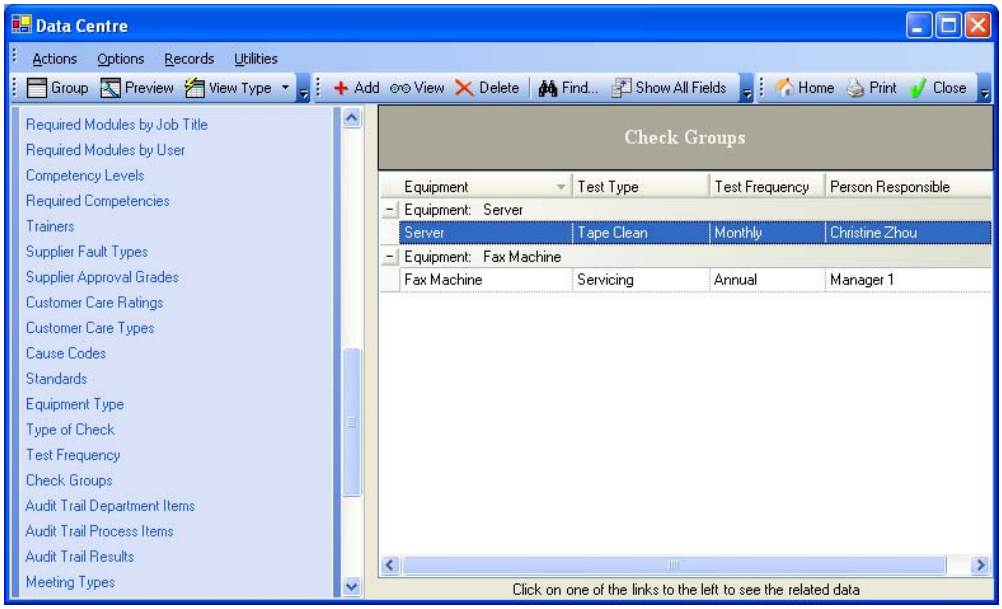
If a test frequency category is changed, it will automatically update all records in the asset register to the new test frequency.

5.2.2.24. Check Groups

Finally, it is necessary to assign the Check Groups, e.g. Vehicle and associate the type and frequency of test for each check group.



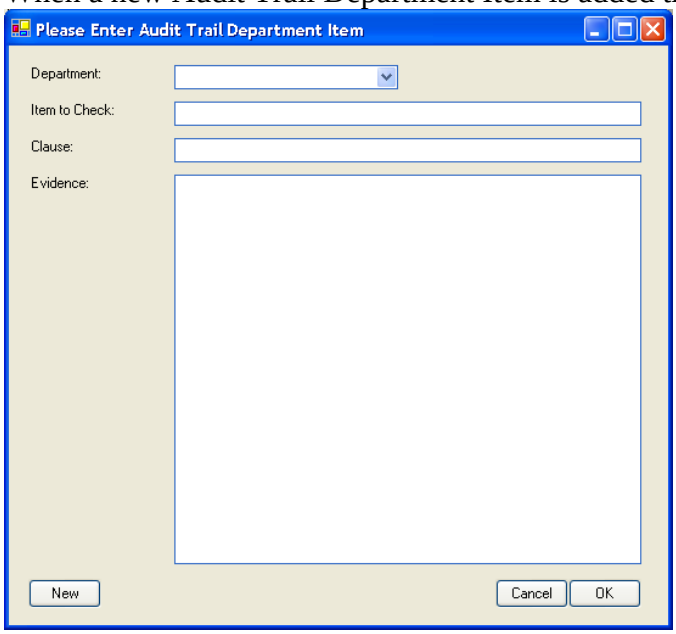
This will populate the database with the following information:



5.2.2.25. Audit Trail Department Items

These are a set of items to check and evidence for all internal audits of specified departments against the required clauses of the Standard. Audit Trail Items can be automatically added to an audit trail when creating a new internal audit. Refer to Internal Audit section for further information. Audit Trail Items can be tailored to address individual Departments.

When a new Audit Trail Department Item is added the following screen appears:



The department is selected using the drop-down list. The Administrator should then complete each section and select “Ok”.

5.2.2.26. Audit Trail Process Items

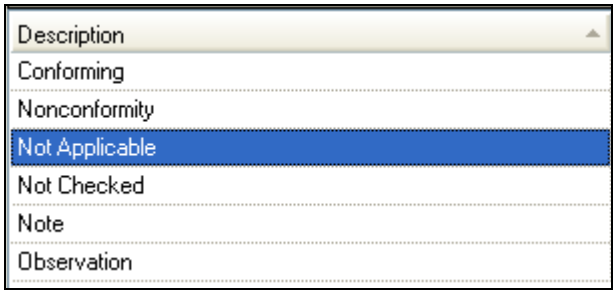
These are a set of items to check and evidence for all process based internal audits in comparison to the relevant clause(s) of the Standard. As with Audit Trail Department Items this can also be

automatically added to an audit trail for internal audits and tailored to meet the requirements of a specific process.

A window similar to that shown above for Audit Trail Department Items will appear. However instead of a Department drop-down list there will be a list of processes available for audit.

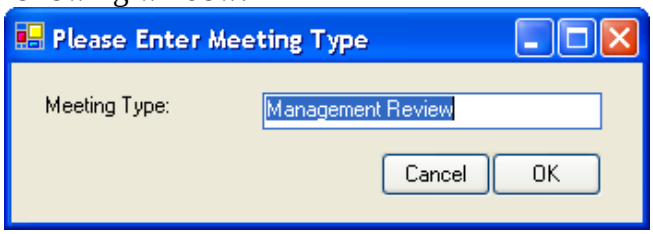
5.2.2.27. Audit Trail Results

The categories for the audit trail results are recorded in this subrecord and could include the following:



5.2.2.28. Meeting Types

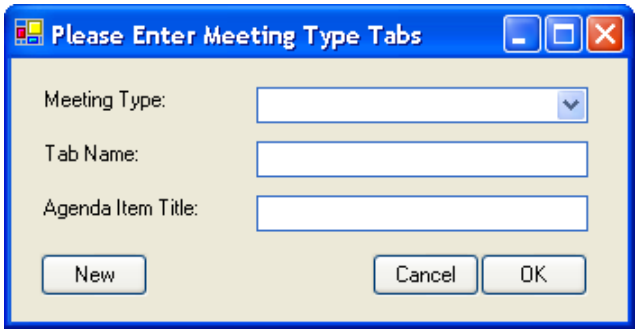
The relevant types of meeting held within the organization should be added to Dolphin via this subrecord. To add a new meeting the “Add” button should be selected and this brings up the following window:



The title of the meeting should be typed in the box and then click “Ok” to save the changes to the subrecord.

5.2.2.29. Meeting Type Tabs

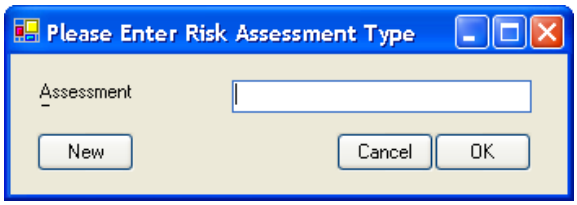
When the various meetings have been established in Dolphin it is possible to assign Meetings Tabs, which constitute broad agenda items. Select the “Add” button for this subrecord and the window below appears:



5.2.2.30. Risk Assessment Types

To enable the risk assessment record to be generated it is necessary to populate various subrecords as follows. The Risk Assessment Type relates to the activity within the organization that is being assessed.

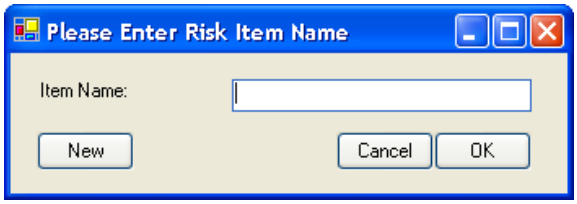
Selecting “Add” will bring up the following pop-up:



The area or activity to be assessed should be added. This may include; Fire Risk Assessment, COSHH Assessment, DSE Assessment, Manual Handling Assessment, Annual Checks or Monthly Checks, etc.

5.2.2.31. Risk Item

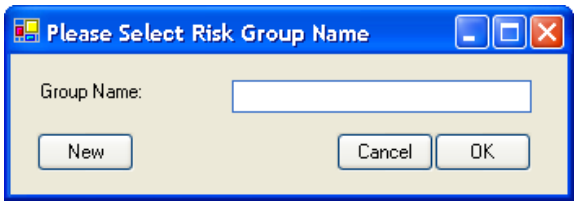
Selecting “Add” will bring up the following window:



The Risk Items, which will form part of the risk assessment should then be listed and may include; powered gates, fork lift, band saw, paint storage, step ladders, lifting strops, etc.

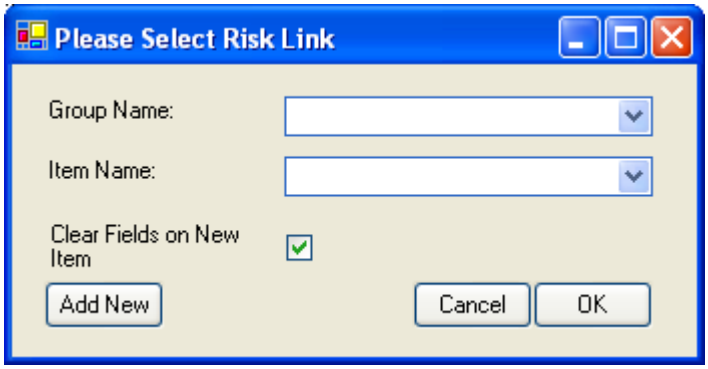
5.2.2.32. Risk Group

An activity or task may be a common occurrence in a particular department or between departments or for a specific job role, e.g. Installation, Visiting Clients, Budget Management, etc. Alternatively the risk group may relate to an area within the company, e.g. workshop, offices, car park, factory, etc. The Risk Groups are defined by selecting “Add” and entering a Group Name for each group identified.



5.2.2.33. Risk Link

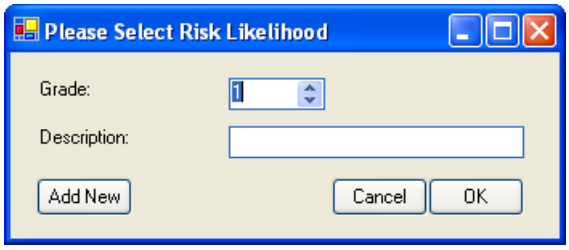
Risk Groups and Items may need to be linked to enable a comprehensive risk assessment to be conducted. This subrecord enables an organization to collate linked groups and items in preparation for risk assessment, e.g. linking Factory A with fork lifts.



The tick box enables the Risk Assessor to clear the fields before adding the next item.

5.2.2.34. Risk Likelihood

This is a measure of the probability of the risk occurring and selecting the "Add" button for this subrecord will result in the following pop-up:

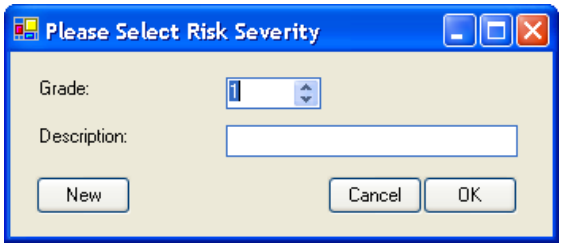


The Grade represents a scale whereby '1' may represent "Extremely likely" to occur. The description should be brief and provide clear distinction between levels, as demonstrated below:

Grade	Description
1	Extremely likely
2	Quite Likely
3	Possible
4	Quite Unlikely
5	Extremely Unlikely

5.2.2.35. Risk Severity

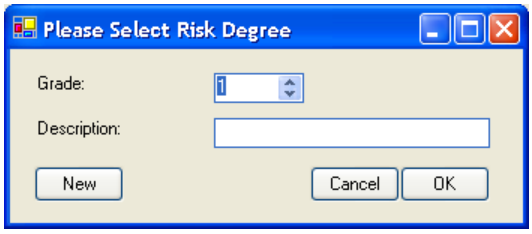
This is a measure of the severity of the risk if it is realized. As with the Risk Likelihood choosing "Add" will bring up a similar popup window, as shown below:



The Grade and a description should be added, e.g. Grade 1 – "Most Severe", Grade 3 – "Moderate", Grade 5 – "Minimal Impact", etc.

5.2.2.36. Risk Degree

The Degree of Risk is a measure of the impact of the risk if the risk occurs. The value for Risk Likelihood is multiplied by the value for the Risk Severity giving an overall Risk Level, which is known as the Degree of Risk. Selecting “Add” will bring up the following window:



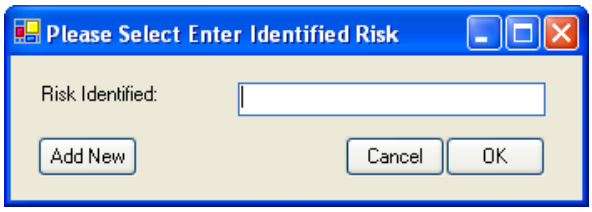
The Grade will represent the value of the Risk Level, e.g. Risk Severity of 5 multiplied by Risk Likelihood of 5 gives a value of 25. If 5 represents “Extremely Unlikely to Occur” and “Minimal severity” an organization may choose to accept and monitor such a risk because it may be economically unviable to take action to reduce or eliminate the risk.

The risk control techniques commonly applied are:

- Accept the risk (i.e. risks that have a low probability of occurring and low impact if they occur)
- Reduce the risk (low impact and high probability)
- Manage the risk (high impact and low probability)
- Eliminate the risk (high impact and high probability)

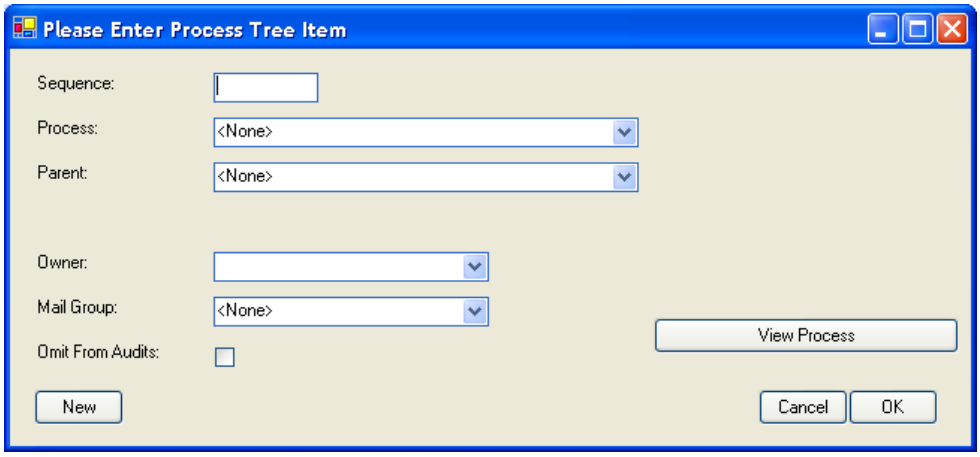
5.2.2.37. Risk Identified

It is possible to add a series of “common” risks as subrecords. This assists when completing a risk assessment record, because a number of pre-identified risks will appear as choices for selection. Identified risks are added by selecting the “Risks Identified” subrecord then “add” and the following box appears:



5.2.2.38. Process Tree

This subrecord has been added to allow the generation of a process tree in the Process Centre. Selecting “Add” will result in the following screen:



The relevant data should be selected from the drop-down lists and will build up the process tree. If the “Omit from Audits” box is ticked it will not be possible to select the process in the Internal Audit record.

It is possible to designate a specific group of personnel to receive updates as to changes made, via the “Mail Group” option and also to assign the Process Owner so that responsibility for management of the process is clearly identified.

Chapter 6. Mail Centre

6.1. Introduction

The Mail Centre is the place to send/receive internal mail from other Dolphin Users.

When a User is logged in to the system, the mail system is checked every 30 seconds to determine whether that User has new mail. The User is automatically informed via on-screen reminders of how many mails have not been read i.e. not ticked in the “Accessed?” column.

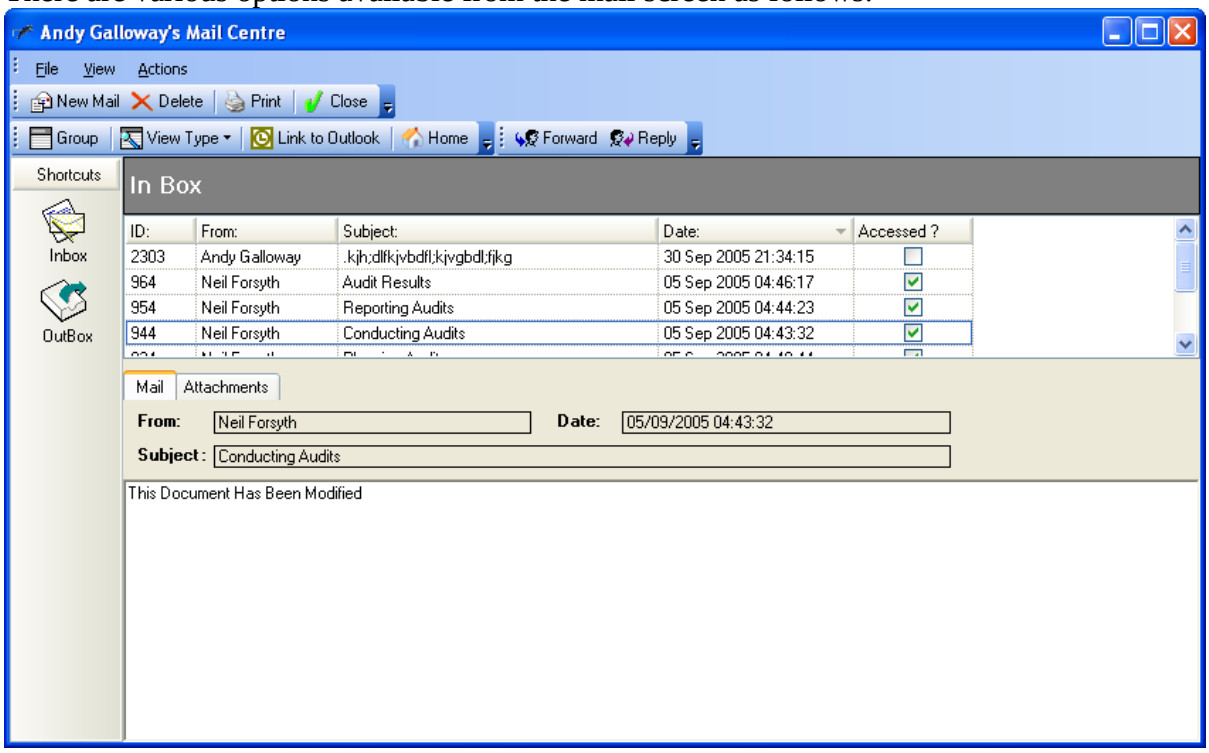
Clicking on the “View Later” button causes the reminder box to be cancelled. These Mails can still be accessed via the “Mail Centre” button from the Dolphin “Main Page”.

Clicking on the “View Now” button causes the reminder box to be cancelled and takes the User to the Mail Centre.

Once in the Mail Centre, the User can look at their InBox (received mail) and OutBox (sent mail) and can see whether they have read the sent mail.

Double clicking on a mail item in the inbox will open the mail or will take the user to a specific part of Dolphin, e.g. if the mail is a new corrective action, double clicking will open the corrective action enabling the User to authorize or reject the action and so on.

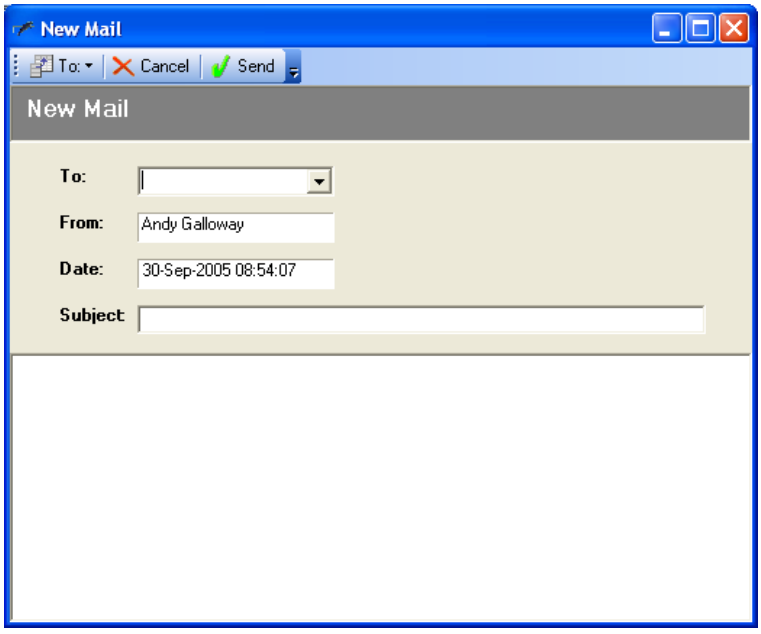
There are various options available from the mail screen as follows:


Andy Galloway's Mail Centre
File View Actions
New Mail Delete Print Close
Group View Type Link to Outlook Home Forward Reply
Shortcuts
Inbox
OutBox
In Box
ID: From: Subject: Date: Accessed ?
2303 Andy Galloway .kjh;dlfkjvbdfl;kjvgbdl;fjkg 30 Sep 2005 21:34:15
964 Neil Forsyth Audit Results 05 Sep 2005 04:46:17
954 Neil Forsyth Reporting Audits 05 Sep 2005 04:44:23
944 Neil Forsyth Conducting Audits 05 Sep 2005 04:43:32
Mail Attachments
From: Neil Forsyth
Date: 05/09/2005 04:43:32
Subject: Conducting Audits
This Document Has Been Modified

6.2. File Menu

6.2.1. New Mail

This button causes a new mail composition screen to open.



From here, using the “To:” button, a User can select the recipient or group to which the mail is sent. The User can also state a subject and text for the message. The person logged in as the current User is automatically entered as the sender of the Mail and the system date and time is entered as the Mail date and time.

The Mail can be deleted using the “Delete” button at any time up to the point that the “Send” button is pressed. Pressing “Send” updates the time part of the “Date” field and logs the Mail in the mail database. The next time the recipient logs in, they will be informed that they have received a Mail from this User.

It is possible to link data centre records, process maps, dolphin and local documents to internal mail. This acts a pointer to the file in the system and DOES NOT make a duplicate. All relevant automatic Dolphin mails will now contain a link with the item to which they refer, so at the click of a button the user can now see this item. Linkable Items include:

- Data Centre
  - Internal Audits
  - External Audits
  - Actions / Improvements
  - Customers
  - Customer Care
  - Suppliers
  - Training Records
  - Evaluations
  - Meetings
  - Equipment Records
- IMS Centre
  - Dolphin Documents
  - External Documents
- Process Centre
  - Process Maps

If the “Link to Outlook” option is set up in the “Preferences” section, an email will automatically be sent to the User’s Microsoft Outlook mail system for transmittal to the recipient. Bear in mind that the recipient’s email address must be logged in the “Contacts Details” section of the “User Centre” before this facility will operate.

6.2.2.

Delete Mail

This button deletes the currently selected mail from either the Inbox or Outbox (The User is prompted to confirm that this action is required)

6.2.3.

Print Mail

This button takes the User to the Mail Section of the Report Centre to print a single mail or list of mails produced from selecting various parameters.

6.2.4.

Close

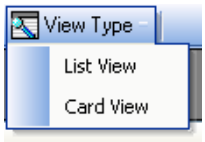
This button closes the Mail Centre and returns the user to previous window open.

6.3. View Menu

6.3.1. Group

This button adds/removes a Group Bar to the top of the mail list, where a header can be dragged, to group by that column e.g. the User can group all mails received from a certain individual together under that individual's heading. (See Creating Sorts on Groups)

6.3.2. View Type



This Option selects between a Table of emails with columns representing the individual fields and rows representing mails, or Card view where each email is displayed in a format similar to a rolodex card.

6.3.3. Link to Outlook

This button opens up a separate window to view external emails in either Microsoft Outlook or Microsoft Outlook Express. From here the User can compose new external Email, View External Mail or View/Edit the Users Address book.

6.4. Actions Menu

6.4.1. Forward Mail

This button sends a copy of the selected mail to a specific individual or group.

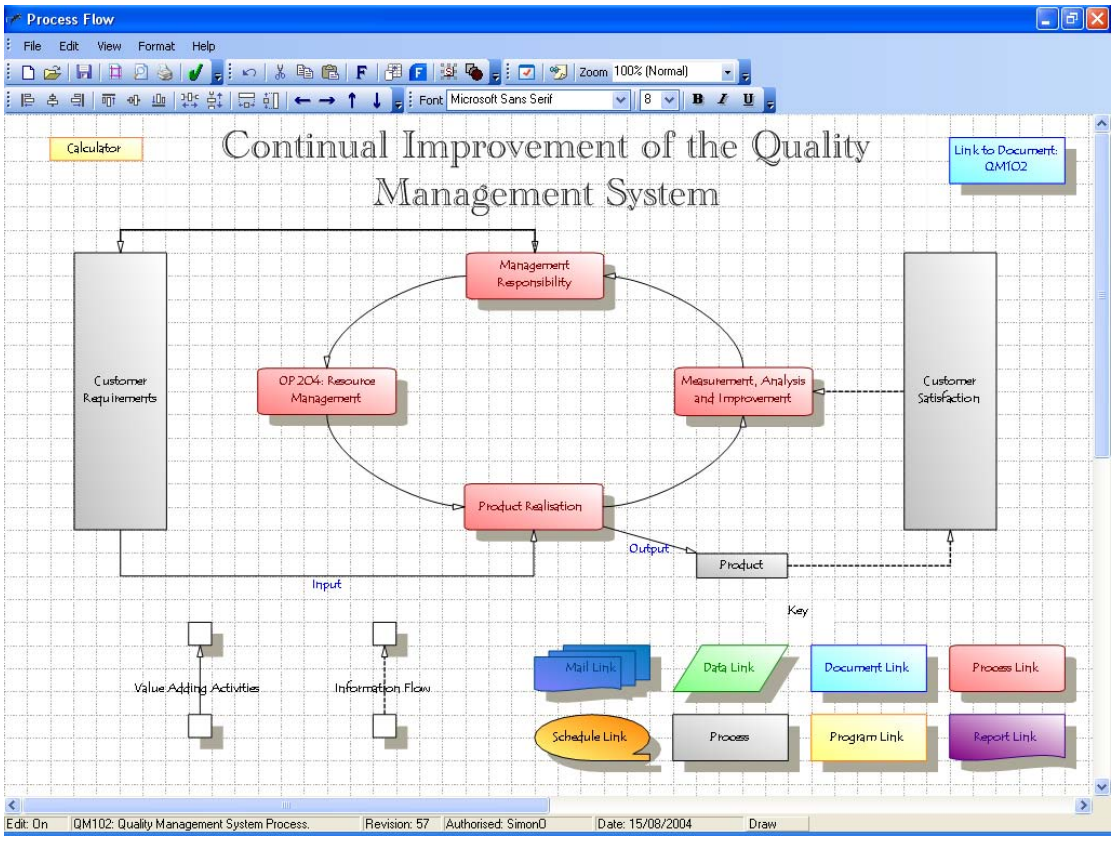
6.4.2. Reply

This button opens up a compose screen and automatically enters into the To: Box the Username of the person who sent the selected mail so a reply can be sent.

Chapter 7. Process Centre

7.1. Introduction

The Process Centre is where the business and support processes can be represented in a graphical format. It is the heart and soul of all the Process Map creation and navigation within Dolphin.



From here an Administrator or Process Owner can create and link any number of flowcharts/Process Maps to any Centre within Dolphin, any external program/document, any internal document or process map. In short you can define the exact way you require your company to run. Below is a description of the truly immense possibilities made possible from the Process Centre.

7.2. Creating Process Diagrams

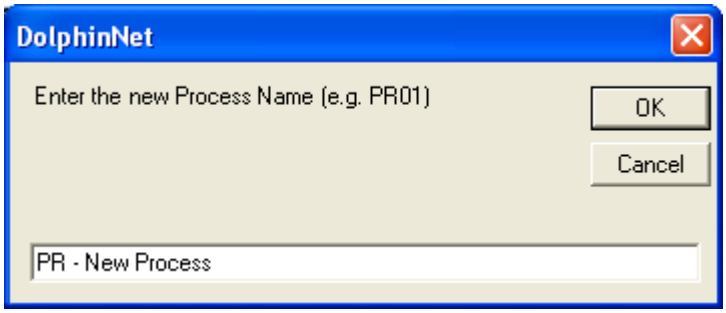
A Process Diagram is a series of “Nodes” of various shapes and colours connected together by various “Links”.

There are four different ways to create new Process Diagrams within the system:

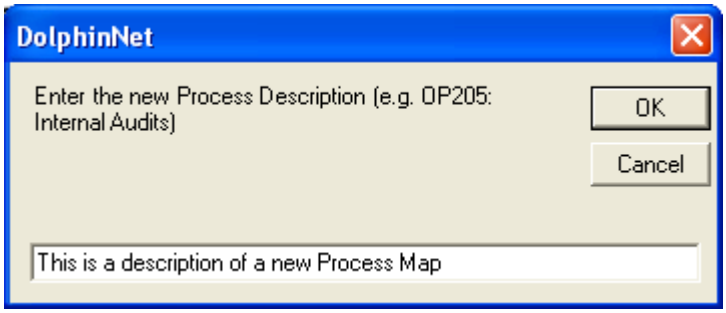
1. Create File from New
2. Copy Existing Diagram
3. Import Existing Diagram
4. Use the “Drill Down” function. This method is recommended because it will automatically create an entry in the Process Tree.

7.2.1. Create File from New

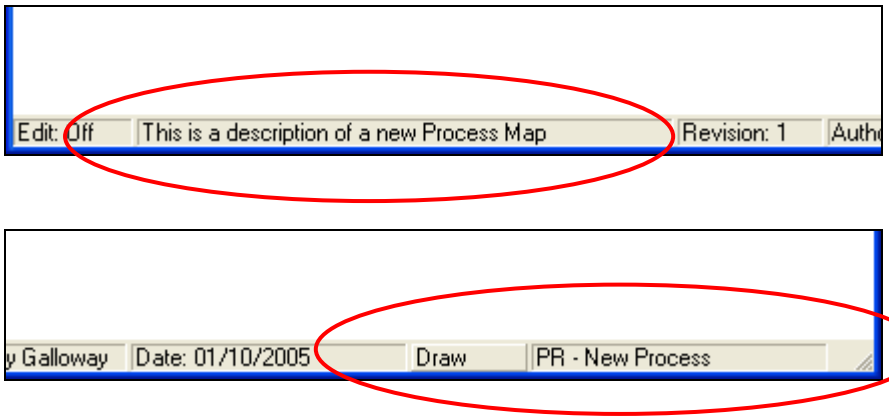
To create a new Process Diagram from new, open any Process Diagram, click on the File menu and select “New” or click on the “New” icon on the button bar. When prompted, enter the Process Name.



This should begin with "PR". Some examples of this are PR01, PR - Help File 02, PR - Main Process Map, PR Sales 01, etc. This will become the file name and will be saved with the extension ".flw" in the FlowCharts subfolder. There is a limit of 75 characters to this file name. Click on OK and in the next dialogue box enter a description of the Process Diagram.

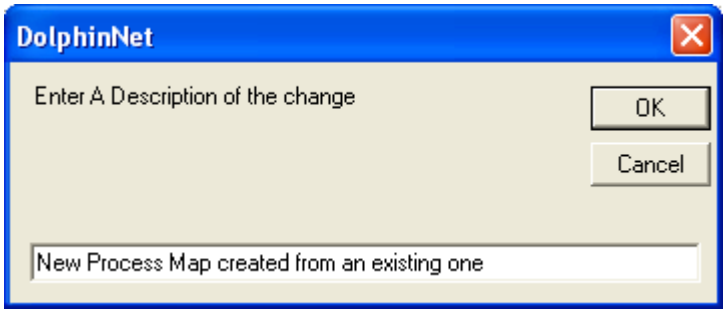

DolphinNet
Enter the new Process Description (e.g. OP205: Internal Audits)
OK
Cancel
This is a description of a new Process Map

This information will appear on the Status Bar at the bottom of the Process Panel. This can be changed at any time by an Administrator or Process Mapper clicking on Edit, Change Form Name. There is no need to be in Edit Mode to do this.

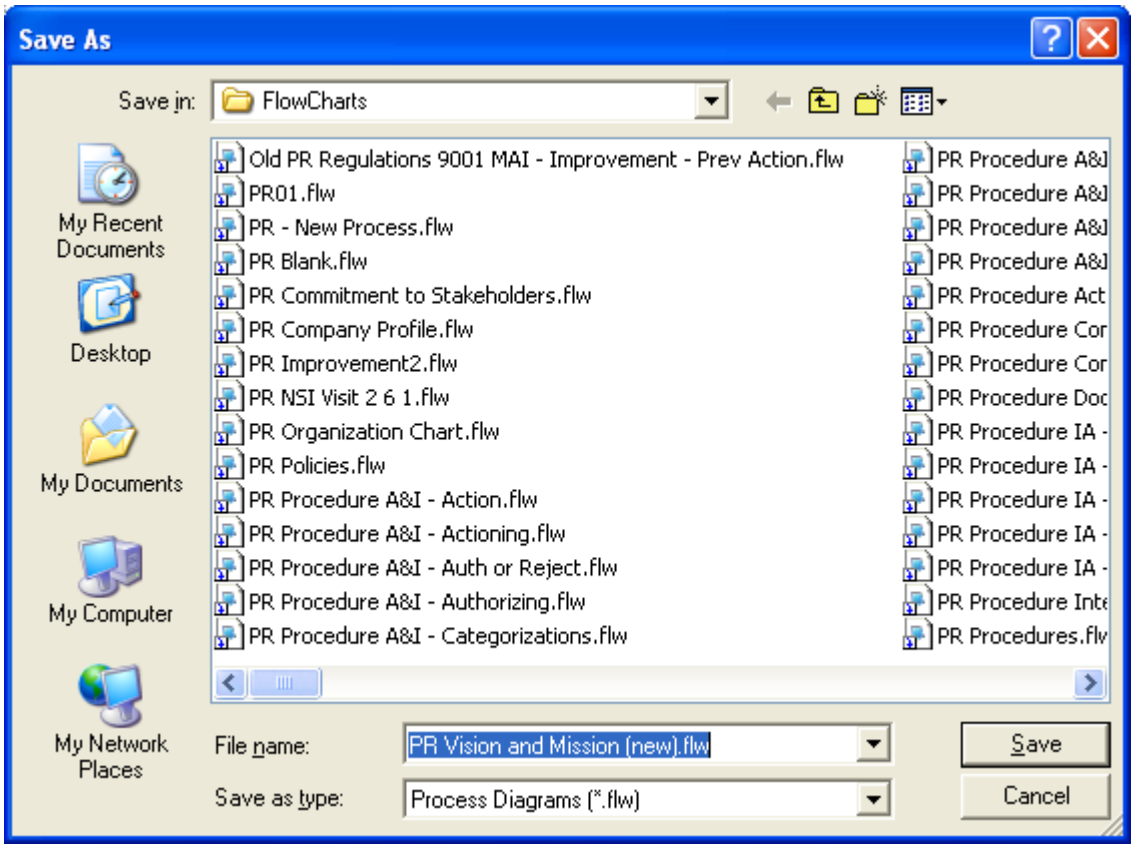


7.2.2. Copy Existing Map

To create a new Process Diagram from an existing Process Diagram, open the Process Diagram to be copied, click on the File menu and select “Save As…”



When prompted, the description of the change (in this case, the reason for creating the new file). This description will appear in the list of revisions in the “Revision History”. Click on “OK” to continue the “Save As…” routine. When prompted in the next dialogue box, enter the Process Name.



This should begin with "PR". Some examples of this are PR01, PR - Help File 02, PR - Main Process Map, PR Sales 01, etc. This will become the file name and will be saved with the extension ".flw". To ensure this file is accessible from the automatically created lists within Dolphin, ensure that the file is located in the FlowCharts subfolder. There is a limit of 75 characters to this file name. Click on OK and enter a description of the Process Diagram. This will appear on the Status Bar at the bottom of the Process Panel. This can be changed at any time by an Administrator or Process Mapper clicking on Edit, Change Form Name. There is no need to be in Edit Mode to do

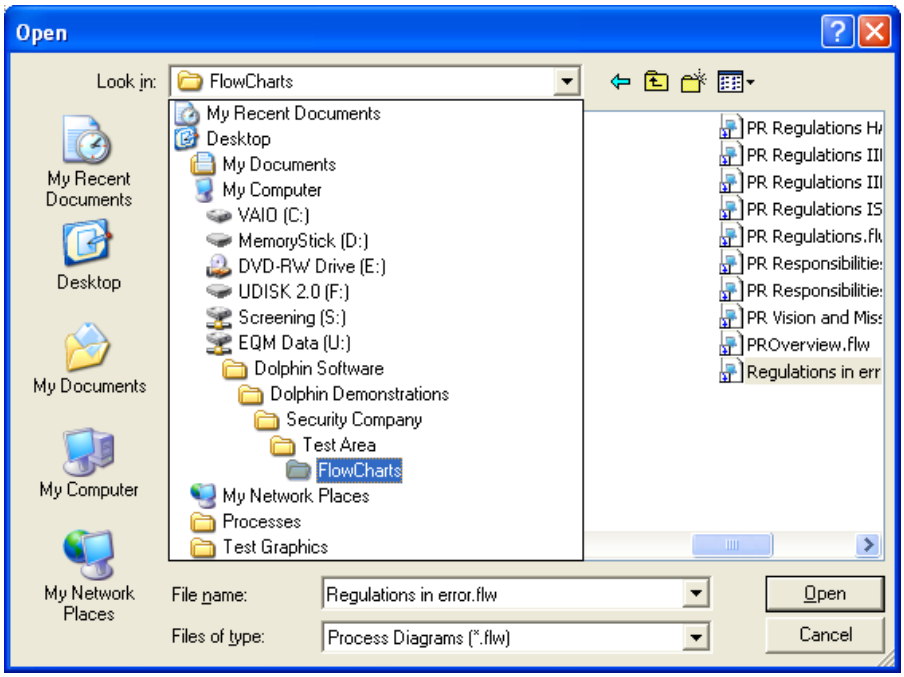
this. Clicking on the “Save” button will provide a confirmation message that the file has been saved and the newly created file is open in the Process Centre. Additionally, a notification of the change will be automatically generated and emailed to the designated Mail Group for the process as described in the Preferences section.

7.2.2.1. An Alternative Copy Routine

As an alternative to the above method, you can access the file that you want to copy and create a copy via the computer’s operating system then Import the new file as in “Import Existing Map” section below.

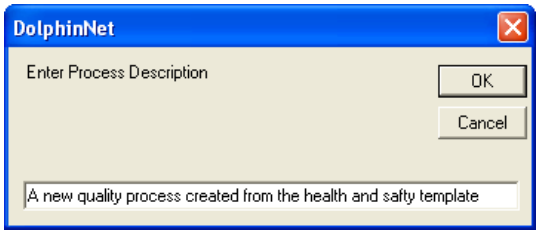
7.2.3. Import Existing Map

To import a Process Diagram from elsewhere, go to the Process Centre, click on the File menu and select “Import”.



Find the .flw file that you want to import. Ensure that the file name begins with “PR”. Some examples of this are PR01, PR - Help File 02, PR - Main Process Map, PR Sales 01, etc. Click on OK and enter a description of the Process Diagram.

If the process map chosen to import has the same filename as an existing process map the operator is asked if they want to overwrite. If the operator answers yes then the revision history belonging to that filename is cleared back down to revision 1.



This information will appear on the Status Bar at the bottom of the Process Panel. This can be changed at any time by an Administrator or a User with Process Map editing authority by clicking on Edit, Change Form Name. There is no need to be in Edit Mode to do this. Clicking on "OK" continues the import routine and Dolphin will move a copy of the selected file into the active FlowCharts subfolder to ensure this file is accessible from the automatically created lists within the active Dolphin system.

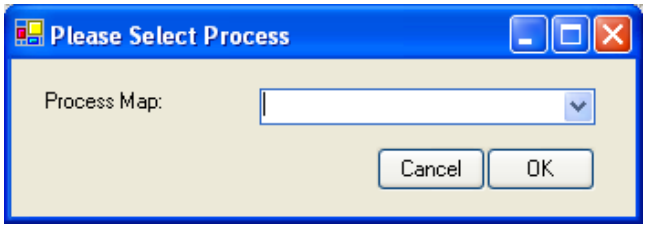
WARNING: If this Import creates a duplicate file name in the FlowCharts subfolder there will **not** be an error message and the original file **will** be overwritten without warning.

7.2.4. Create a process map using the "Drill Down" Function

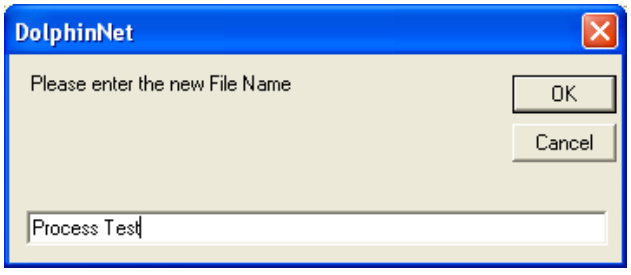
This function allows a user to create process maps at different levels within the Process Centre. For example Process Map, PROverview is regarded as the parent map for the organization and below this level additional process maps, e.g. monitoring customer satisfaction, installing alarms, etc., could be created.

To use the Drill Down function the User must be working in the Edit Mode function. Select the Node below which the new process will be created and right click. Select the following button from the list:

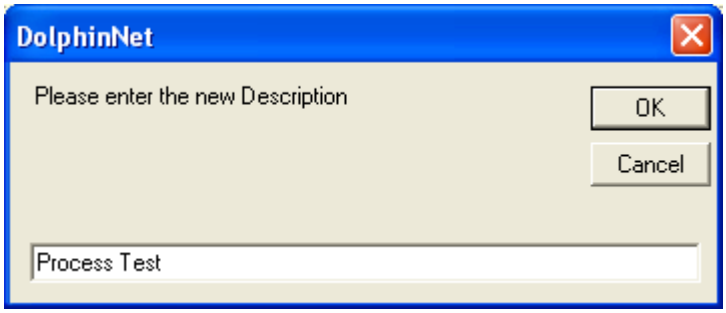
A popup will ask the User to select the Process as follows:



The next popup that appears requires a new file name to be entered, e.g. Monitoring Customer Satisfaction. The 'PR' pre-fix does not have to be added because this is automatically added to the Filename by Dolphin.



A description of the new process map should be entered. This description may be the same as the filename if required.



Finally, a popup appears to show that the drill down has been successfully completed.

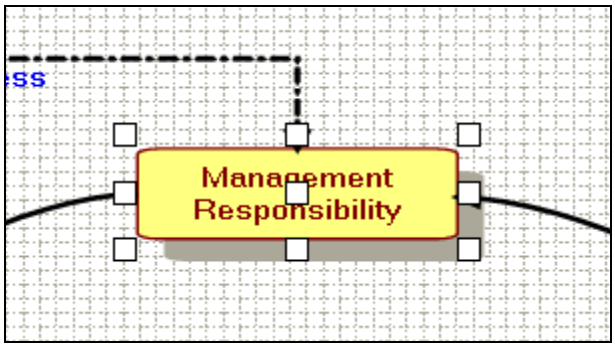
It is necessary to log out of Dolphin for the changes to take effect and to update the Process Tree.

7.3. Editing Process Maps

7.3.1. Introduction

The Process Diagram is made up by drawing the Nodes. To do this, you need to go in to Edit Mode by clicking on the Edit Mode Button. You know when you are in Edit Mode because you can see the grid lines. Using the cursor, draw a shape by pressing the left mouse button and drag diagonally in any direction from that point whilst holding the left mouse button pressed. When you release the mouse button the default shape is produced

Once the Node has been created, or by clicking on an existing Node, the Node is given "handles". The handles around the perimeter of the Node are for resizing (Resizing Handles). The centre handle is for creating links (Linking Handle).



From this position, there are several options available:

7.3.2. Resize the Node

The Resizing Handles are in each corner and at the mid-point of each edge (defined by the sides of a rectangle around the Node). Putting the cursor over these handles turns it into a double heading arrow. By clicking and dragging on the Resizing Handles, the shape can be enlarged or reduced in size.

7.3.3. Change the Node Formatting

Right click on the selected Node to bring up the Node Properties dialogue box. In this Dialogue Box there are four tabs: Styles, Colours, Flags and Text, Font and Images. Within each of the four tabs, you have the ability to change the various attributes of the Node.

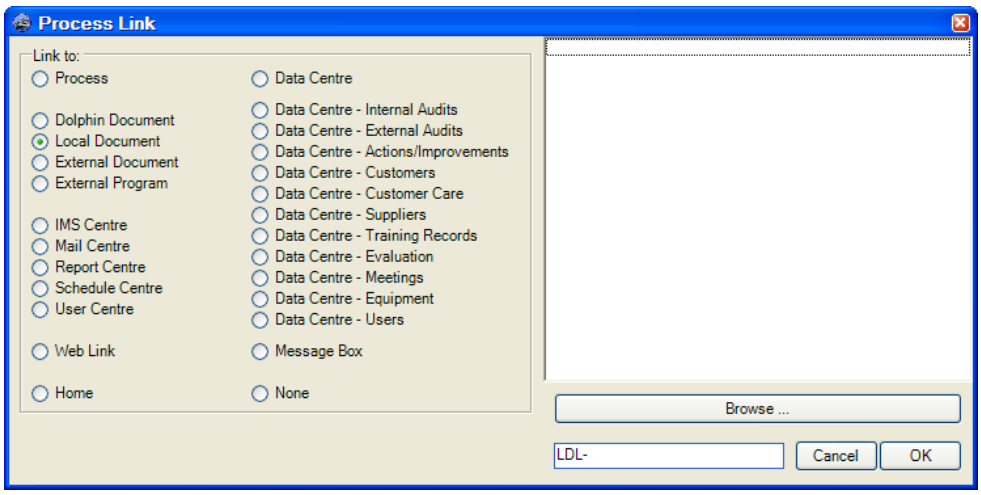
7.3.4. Move the Node

With the Node selected, click on it anywhere except on the handles. The Node can then be dragged anywhere on the Process Diagram.

Once you are sure that the Process Diagram is how you want it, you must save it. On the File menu select Save. When asked “Are you sure?” say yes. Input the reason for the change. It is a good idea to put down a description of what was added or changed as this will become part of the Revision History for the Process Map. Click on OK to save the document. Please note that Administrator access is required to change or save a process. Once the editing is complete and has been saved, go back to Normal Mode (as opposed to Edit Mode) by selecting Change Edit Mode from the Edit menu.

7.3.5. Add a Link

Press the "L" button on the keyboard to open the Link dialogue box. This is shown below.



The functionality of Linking to nodes is very similar as for linking items to a group within the Link Explorer in Preferences.

There are certain limitations on file naming conventions that must be followed to allow the Link function to operate. These are:-

- All Internal Documents within the IMS Centre must start with DD and must be saved as an RTF (Rich Text File) within the Docs Sub Folder. (This is to be changed in a release of Dolphin in 2005 so that .pdf documents and .doc documents can also be saved a standard.)

- All Flow Diagrams must start with PR and saved within the Flowcharts subfolder. The file name cannot be greater than 20 characters.

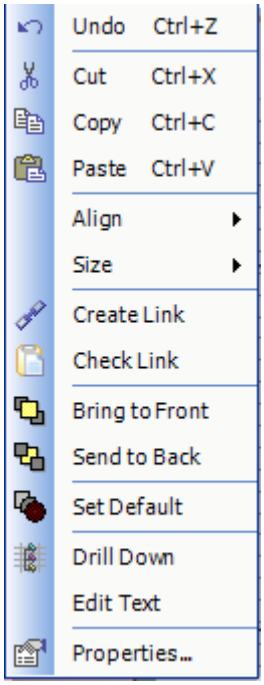
When the link is set up, pressing “OK” saves the settings to the Node Properties and closes the Process Link dialogue box down. Pressing the “Cancel” button closes the Process Link dialogue box down without saving any of the changes made.

7.3.6. Delete the Node

Pressing the delete button on the keyboard deletes the Node, and accompanying interconnections.

7.3.7. Short Cut

By right clicking on a node in edit mode will give a context menu containing the options detailed in the picture below



Selecting the “Edit Text” option allows the text within the cell to be spell-checked and font type modified. Double-clicking on a node while in “Edit Mode” will also bring up the “Edit Text” dialogue, enabling font type to be changed, etc.

7.3.8. Add Node Interconnections

The handle in the centre of the Node is called the Connection Handle. To draw a link from one Node to another, click on the Connector handle and drag a line to the Node you want to connect to.

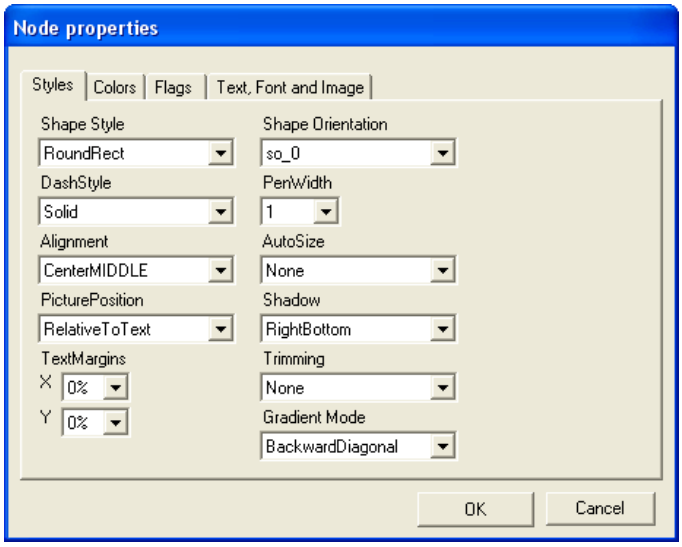
Once drawn, the connector takes the shortest route from one Node to the other. The Connector is drawn with three Handles, one at each end and one at the midpoint. These are called Positioning Handles and allow you to change the shape of the Connector however you like. By clicking on the midpoint Positioning Handle and dragging it, two more Positioning Handles are created, one at each midpoint between that handle and the two Connector ends.

Once you have positioned the original midpoint Positioning Handle where you want it, you can then do the same with the new Positioning Handles. As you drag each handle, more Positioning Handles are added, allowing you infinite control over the size, shape and route of the Connector. The Connector takes the straightest route from the final Positioning Handle to the Connection Handle in the centre of the Node, stopping at the Node boundary. Whenever four or more Positioning Handles appear in a straight line, some are considered to be redundant, and Dolphin does away with all except the Positioning Handles at each corner and the one at the midpoint.

7.4. Node Properties

7.4.1. Styles Tab

Right clicking on a Node brings up the Node Properties dialogue box. Below is displayed the Styles tab of the node properties dialog box. Each option is then described.



7.4.1.1. Shape Style

From the drop down menu you can change the shape of the Node. You have access to many different shapes. Select whichever shape you have predefined in your Formatting scheme. This can be changed at a later stage should you so wish.

7.4.1.2. Shape Orientation

The Node can be rotated through 90 degrees, 180 degrees or 270 degrees. The default option is zero degrees. This does not change the orientation of the text in the shape and some shapes have rotational symmetry of 90 degrees or 180 degrees and so no change will be detected in their orientation if one of these rotations is selected. Also, not all shapes can be rotated as this would alter their generally accepted shape.

7.4.1.3. Dash Style

This gives the option of having the outline of the Node picked out in a solid line or choose from dotted, dashed, dashed and dotted, etc.

7.4.1.4. Pen Width

This option defines the thickness of the shape outline. Give the shape outline a thickness of zero to show floating text. The remaining attributes can still be added but there will be no border to the shape.

7.4.1.5. Alignment

Select the alignment of the text within the shape. Select from the nine standard options made up from top, middle and bottom, left right and centre.

7.4.1.6. Auto Size

This option allows you to shrink or expand the text or picture inserted in the shape to the size of the shape, or to expand or shrink the size of the shape to the size of the text or picture. None means that the text or picture will retain its own size and so will the shape. Any adjustments will need to be done manually.

7.4.1.7. Picture Position

Similar to the Alignment option but this control works on the image that will show in the shape. Additionally, there is a tenth option and that is to show the image relative to the text.

7.4.1.8. Shadow

Decide whether the shape will have a shadow and, if so, where it will appear relative to the shape. The shadow has the same size and shape as that selected in Shape Style for the main shape.

7.4.1.9. Text Margins

The margins surrounding the text may be offset so that it does not rest against the lines on the left or right inside the shape. The text can be offset by setting the left and/or right margins between 0% and 50% of all the available space. (At 50% left margin and 50% right margin, there is no space left for the text!)

7.4.1.10. Trimming

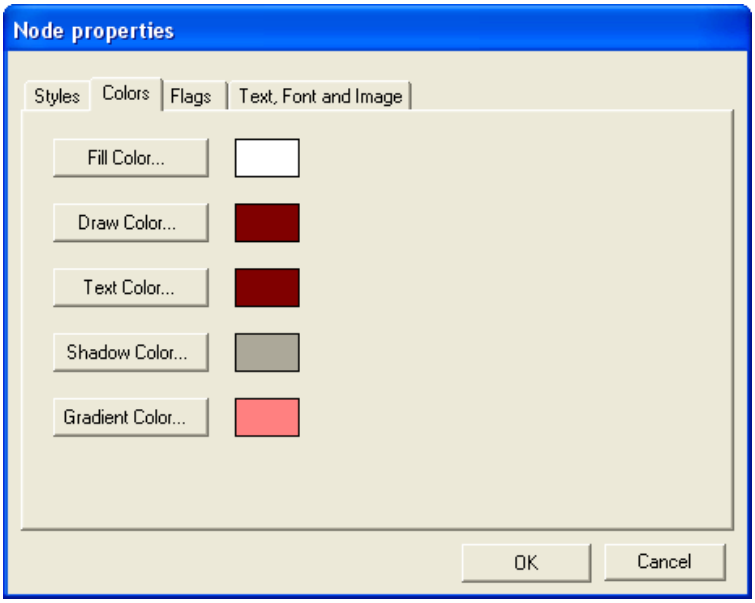
This option sets the default text trimming within the nodes.

7.4.1.11. Gradient Mode

This option selects how the gradient will operate within the node.

7.4.2. Colours

Below is displayed the Colours tab of the node properties dialog box. Each option is then described.



7.4.2.1. Fill Colour

Select the fill colour of the shape from a standard palette of colours, including the ability to create custom colours. This is also the Starting colour for the gradient.

7.4.2.2. Draw Colour

Select the colour of the shape outline from a standard palette of colours, including the ability to create custom colours.

7.4.2.3. Text Colour

Select the colour of the text within the shape from a standard palette of colours, including the ability to create custom colours.

7.4.2.4. Shadow Colour

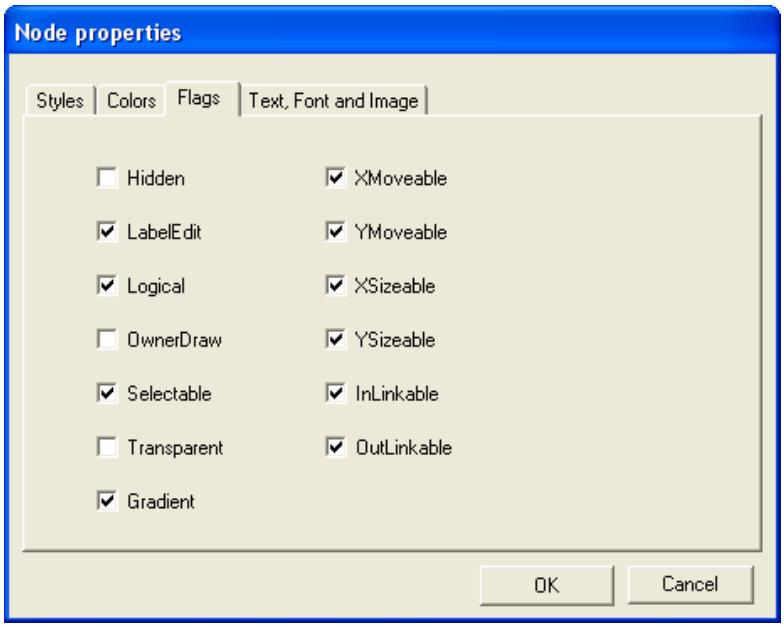
Select the colour of the shape's shadow from a standard palette of colours, including the ability to create custom colours.

7.4.2.5. Gradient Colour

Select the end colour of the shape's gradient from a standard palette of colours, including the ability to create custom colours.

7.4.3. Flags

Below is displayed the Flags tab of the node properties dialog box. Each option is then described.



7.4.3.1. Hidden

When checked causes the shape to be hidden

7.4.3.2. Label Edit

Allows a User to click on a selected cell to edit text

7.4.3.3. Logical

This allows the administrator to exclude some nodes or links from the diagram logic, for instance, a node that just contains a label or an image and that has not any role in the flow.

7.4.3.4. Owner Draw

This option adds gradient shading on rectangles and circles. This option has been superseded by the gradient facility, and is only kept to maintain backward compatibility.

7.4.3.5. Selectable

This option can disable a node, that node will not react to any mouse or key commands, and cannot be selected. This has the unfortunate effect that you can not select it to make it selectable again. Because of this a Reset Selectable option has been added to the toolbar, which resets all nodes and links in the flow diagram and makes them all selectable.

7.4.3.6. Transparent

When checked, the fill colour is removed and objects behind this shape can be seen through it.

7.4.3.7. Gradient

When checked, a gradient is added to the node. This allows the setting for the gradient colour to override the setting for the fill colour in the method described in Gradient Mode.

7.4.3.8. X Moveable

Can be moved in the X dimension, i.e. can be moved horizontally.

7.4.3.9. Y Moveable

Can be moved in the Y dimension, i.e. can be moved vertically.

7.4.3.10. X Sizeable

Can be re sized in the X dimension, i.e. can be made taller or shorter.

7.4.3.11. Y Sizeable

Can be re sized in the Y dimension, i.e. can be made wider or narrower.

7.4.3.12. In Linkable

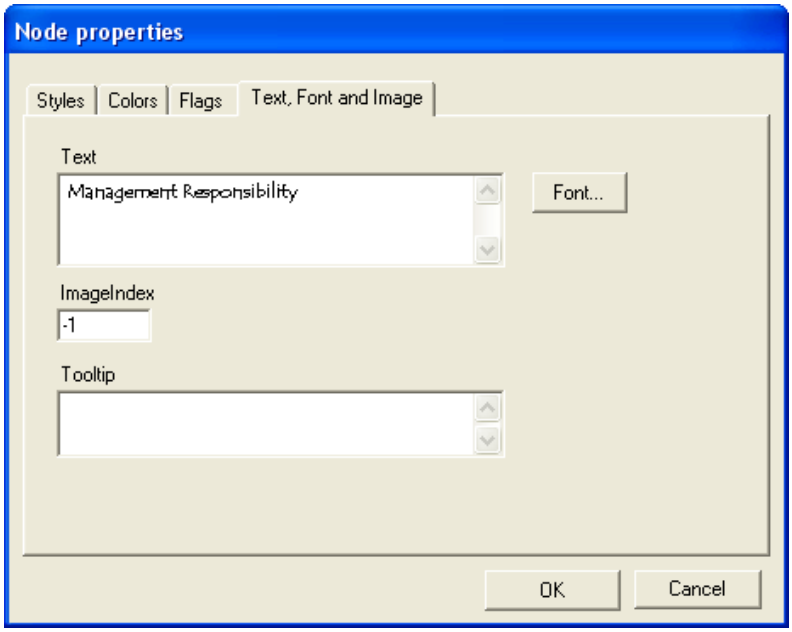
This allows links to come into the node

7.4.3.13. Out Linkable

This allows Links to go out from the Node

7.4.4. Text, Font and Images

Below is displayed the Text tab of the node properties dialog box. Each option is then described.



7.4.4.1. Text

The text that is entered in this box will appear in the Node. This can also be achieved by clicking on a selected Node whilst in the edit mode.

7.4.4.2. Font

Click on the Font button to change the characteristics of your text. You get a standard font dialogue box that allows you change the font face to any font that is installed on your computer, font style such as bold and italics, font size and font effects such as emboss and outline. You can see the way the text will look in the sample text box.

7.4.4.3. Image Index

This is magic little do-hickey that makes pictures appear spectacularly within the confines of the shape boundary the image is taken from the Images folder. E.g. a value of 1 in the image index would look for a file called 1.bmp in the images folder.

7.4.4.4. Tooltip

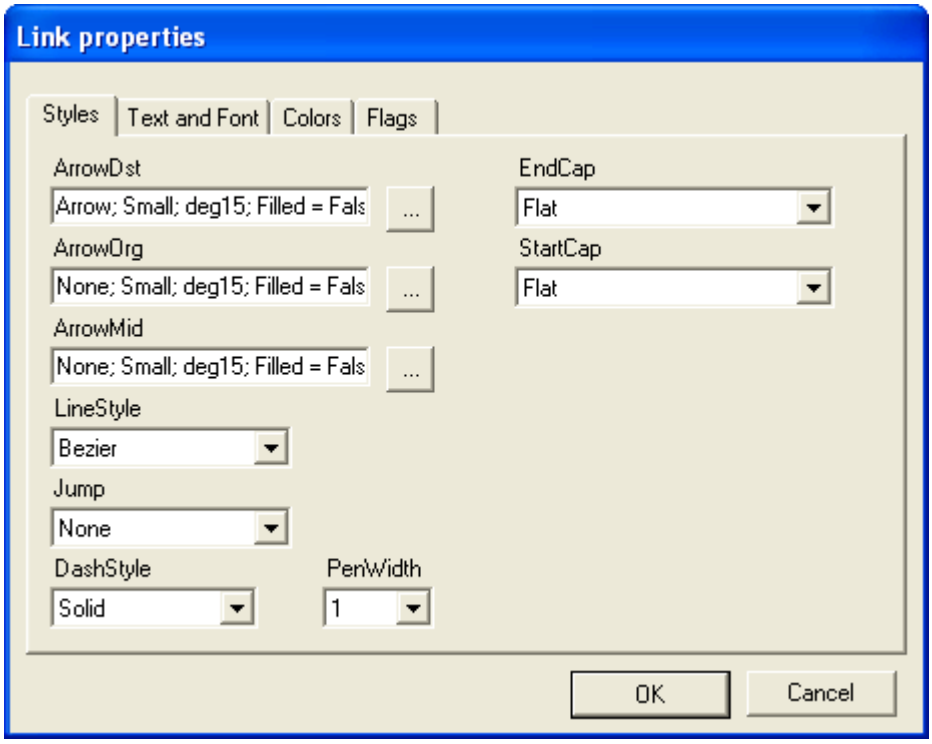
Type some text into the tooltip field. This text will appear when the mouse rolls over the Node.

7.5. Link Properties

Right clicking anywhere on a link will open the Link Properties dialog box. The options therein are described below.

7.5.1. Styles

This page sets the Style Properties for the link. Each of the options is described below.



7.5.1.1. ArrowDst

This stands for Arrow at Destination and sets the arrow style where it enters the new cell. Many options exist to allow the User to make the link look exactly as desired.

7.5.1.2. ArrowOrg

As ArrowDst but this controls the origin of the link.

7.5.1.3. ArrowMid

As ArrowDst, but this controls the middle section of the link

7.5.1.4. Line Style

This option controls the route and shape of the link. For example VHV forces a link to leave the origin node in a Vertical Direction and then turn 90 degrees to go horizontally and then turn again to enter the destination node vertically.

Style	Description
Polyline	A series of connected lines
Bezier	A Bezier curve
Spline	A Cubic spline curve
VH	2 segments: vertical horizontal
HV	2 segments: horizontal vertical
VHV	3 segments: vertical horizontal vertical
HVH	3 segments: horizontal vertical horizontal
VHVH	4 segments: vert horz vert horz
HVHV	4 segments: horz vert horz vert
VHVHV	5 segments: vert horz vert horz vert
HVHVH	5 segments: horz vert horz vert horz
VHVHVH	6 segments: vert horz vert horz vert horz
HVHVHV	6 segments: horz vert horz vert horz vert
VHVHVHV	7 segments: vert horz vert horz vert horz vert
HVHVHVH	7 segments: horz vert horz vert horz vert horz

7.5.1.5. Jump

This section determines what happens when 2 links cross paths.

Jump	Description
None	No jump displayed
Arc	A little arc is displayed at the intersection of links
Break	A break in the line is displayed at the intersection of links

7.5.1.6. Dash Style

This section determines the dash style of the link, so the process can display dotted or dashed lines etc.

7.5.1.7. Pen Width

This determines the thickness of the link.

7.5.1.8. End Cap

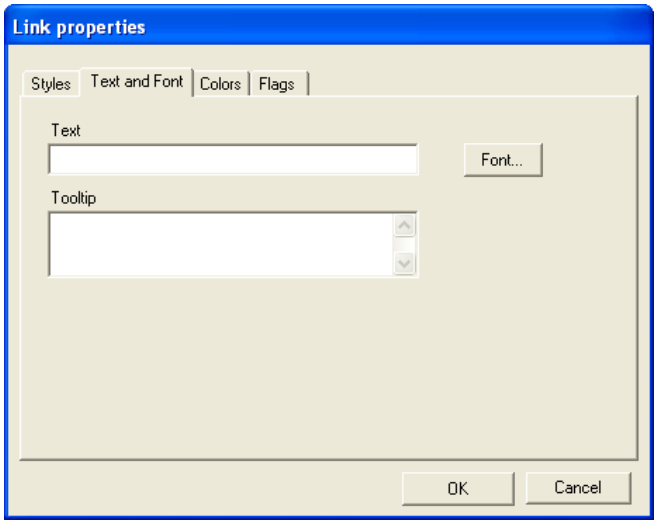
Line caps enable the beginning and the end of a link to be decorated with an arrow or other graphic. Set this value to Custom to add a User-defined line cap.

7.5.1.9. Start Cap

Line caps enable the beginning and the end of a link to be decorated with an arrow or other graphic. Set this value to Custom to add a User-defined line cap.

7.5.2. Text and Font

This page sets the Text and Font Properties for the link. Each of the options is described below.



7.5.2.1. Text

This text appears on or next to the link.

7.5.2.2. Font

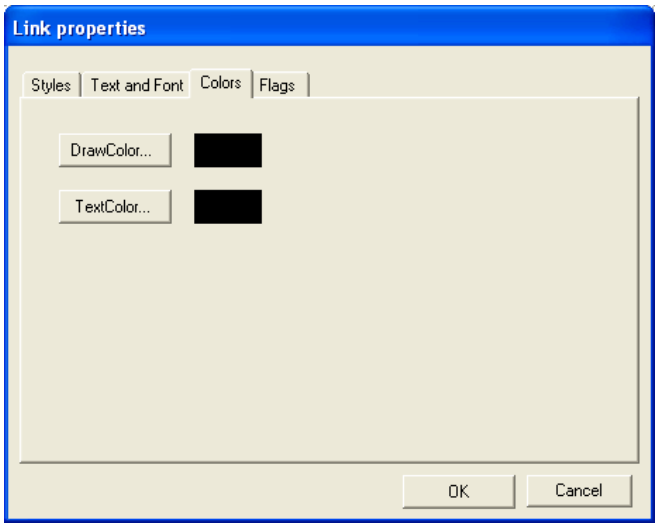
Click on the Font button to change the characteristics of your text. You get a standard font dialogue box that allows you change the font face to any font that is installed on your computer, font style such as bold and italics, font size and font effects such as emboss and outline. You can see the way the text will look in the sample text box.

7.5.2.3. Tooltip

Type some text into the tooltip field. This text will appear when the cursor rolls over the Node.

7.5.3. Colours

This page sets the colour properties for the link. Each of the options is described below.



7.5.3.1. Draw Colour

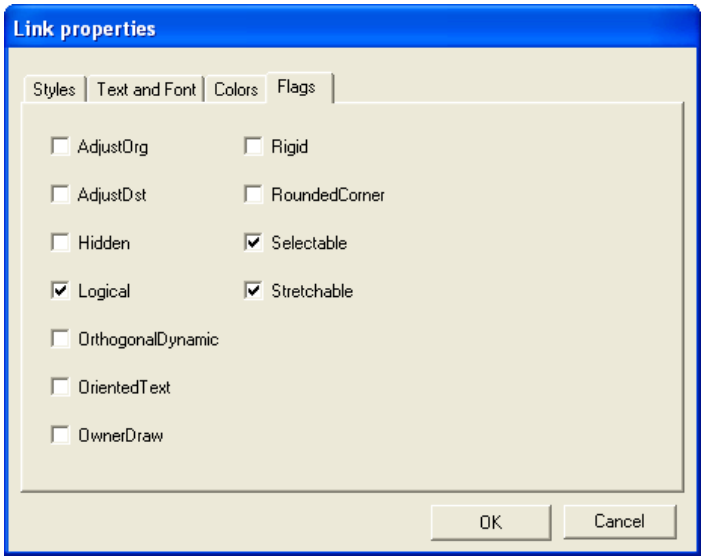
This determines the colour of the link itself.

7.5.3.2. Text Colour

This determines the colour of the text adjacent to the link.

7.5.4. Link Flags

This page sets a myriad of properties for the link. Each of the options is described below.



7.5.4.1. AdjustOrg

This option determines whether it is possible to adjust the position of the first point of the link.

7.5.4.2. AdjustDst

This option determines whether it is possible to adjust the position of the last point of the link.

7.5.4.3. Hidden

This option determines whether the link is visible or hidden.

7.5.4.4. Logical

This allows the administrator to exclude some links from the diagram logic, for instance, a link that just contains a label and that has not any role in the flow.

7.5.4.5. Orthogonal Dynamic

This option determines whether the line is composed of several orthogonal segments (vertical or horizontal) so that the first and last segments of the line are orthogonal to the origin and destination nodes.

Notes

This property will have not any effect if the style property of the line is Polyline or Bezier or Spline.

To observe the "OrthogonalDynamic" behavior, click on a link point and move it. You may also set the AdjustOrg and AdjustDst properties of the link.

Note that when you "stretch" an OrthogonalDynamic link, its LineStyle property value may change.

7.5.4.6. Oriented Text

This option determines whether its text can be drawn in the same direction as the link itself.

7.5.4.7. Owner Draw

This option determines whether you want to provide custom drawing for this item. (Not Supported in Dolphin)

7.5.4.8. Rigid

Determines whether a Link object is rigid or not. If a link is rigid, it follows (without being stretched) its origin node when this origin node is being dragged. A consequence of this rigid behavior is that the destination node follows the origin. If all nodes are linked each other with rigid links then, all the nodes move if the User drags one node. If it is not rigid, it does not move when its origin node is moved. Only its first point follows the node.

Notes
This property allows the User to define a kind of ownership between 2 nodes. If there is a rigid link from node A to node B, then if the User drags A, B follows it. We may say that A owns B. When an owner node is moved, all its owned nodes are also moved. This happens only when the User moves the node interactively with the mouse (dragging).

You may use this property in a recursive way: an owned node may be itself owner of other nodes.

You may also use this property to group several nodes. If there is a rigid link between node A and node B and a rigid link between node B and node A, then nodes A and B are grouped. A follows B and B follows A. Of course you can hide those rigid links and make them inactive with Hidden and Selectable properties.

7.5.4.9. Rounded Corner

Determines whether there are rounded corners where two segments meet. This property will have not any effect if the style property of the line is Bezier or Spline. If it is Polyline, then it will have an effect only if there is a 90° angle between 2 segments (one segment being horizontal).

7.5.4.10. Selectable

Determines whether the item is selectable by clicking on it with the mouse or un-selectable (read only or inactive).

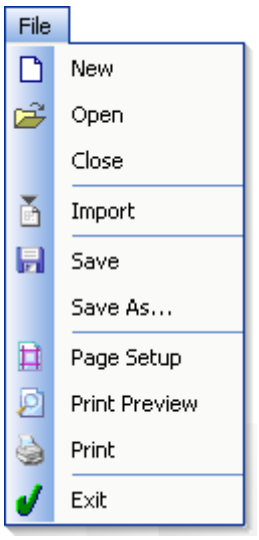
7.5.4.11. Stretchable

Determines whether the link is stretchable or not. When a link is not stretchable, the User cannot interactively stretch it with the mouse.

7.6. Menu Bar

Many parts of the functionality of the Process Centre can b accessed through the menus. These are described below.

7.6.1. File Menu



This menu controls the loading, saving, printing and closing of the Process Centre. See Below for a description of each option.

7.6.1.1. New

This button creates a new process map. When the button is pressed, the User is asked for a filename (must begin with PR e.g. PROverview), and a description of the process. This detail is then added to the status bar.

7.6.1.2. Open

This button opens an existing process map, when clicked the User is prompted to select a file from within the Dolphin flowcharts sub folder. The Revision history and the status bar are then updated with the data for this process.

7.6.1.3. Close

This button simply closes a process map.

7.6.1.4. Import

An administrator or consultant can import a process map from another copy of Dolphin (perhaps on the consultant's laptop). This will also update the revision history.

7.6.1.5. Save

This button saves the process map under a previously determined filename. The User is required to enter text to describe what has changed from the last revision to allow the process to be saved; this is automatically added to the revision history. The process map revision text saved when a process is changed is sent within the email so that the user can identify the changes. The email is sent to all users within the designated Mail Group.

7.6.1.6. Save As…

This button acts as the save option except the User is also prompted for a file-name.

Save As asks for an initial revision text and the process title so that the new process map does not have the same process name as a previous one. Changing the process map name will take effect on all revisions thereby preventing the duplication of a process map in a list.

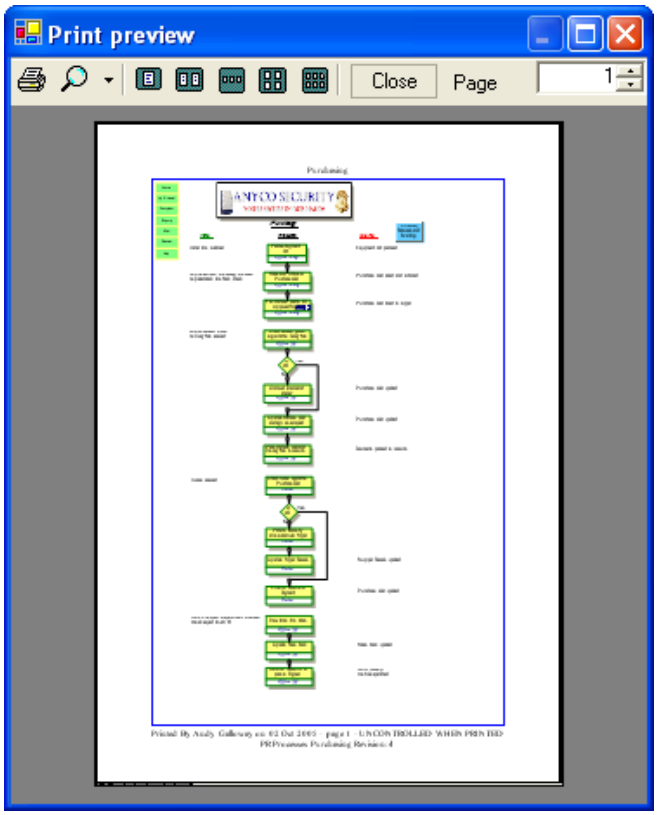
The "Save As" function will automatically create an entry in the Process Tree.

7.6.1.7. Page Setup

With this option, the User can choose the layout of the page, including size, margins and orientation. (Please Note: zoom factor also has a part to play in the overall layout for the printout)

7.6.1.8. Print Preview

This option shows the User what the page/pages will look like when printed. From the Print Preview screen you can access the following functions:

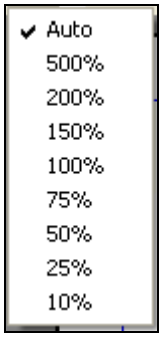


Print

This option prints the Process Map out to the system default printer as specified under the Page Setup options above.

Zoom

From the drop down list, select one of the preset zoom ratios or select auto (default). This only affects the Print Preview panel, not the main document.



View Selector

Select from one, two, three, four or six pages on the view.

Close

Close the Print Preview box and return to the main Process Centre screen.

Page Selector

Use the spin wheels or the page number box to select the page to be viewed.

7.6.1.9. Home

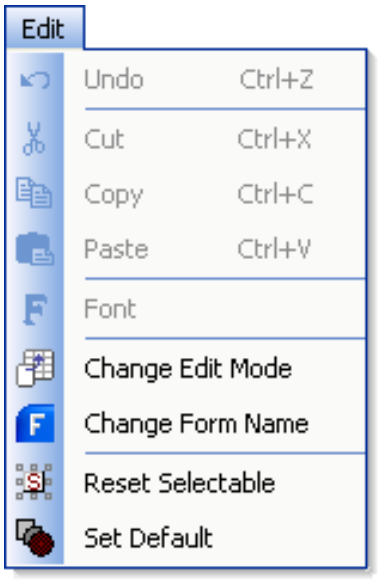
Selecting this option closes the current instance of the Process Centre and reverts to the Dolphin Main Page.

7.6.1.10. Close

Selecting this option closes the current instance of the Process Centre and reverts the system to the area of Dolphin that was being used before the Process Centre was opened.

7.6.2. Edit Menu

The edit menu is the place in Dolphin where most changes start. Described below are the options available from this menu. All of the options in this menu can only be performed in Edit Mode.



7.6.2.1. Undo

The Undo option removes the last amendment to the process map. Please Note: Only the actions that change the Flow diagram can be undoable.

7.6.2.2. Cut

Removes the Node from the page and stores the attributes in memory.

7.6.2.3. Copy

Leaves the Node on the page and stores the attributes in memory.

7.6.2.4. Paste

This option creates another node on the page from the attributes stored in memory.

7.6.2.5. Font

This option allows the User to change the font or typesetting properties of one or many nodes. (Multiple nodes are selected by holding down the control key and selecting one or more nodes with the left mouse button).

7.6.2.6. Change Edit Mode

This option is only available to Administrators, and changes into a mode, showing the grid lines and allowing an Administrator to make changes to a process map, or create new process maps. The only time a process can be saved is within Edit Mode.

7.6.2.7. Change Form Name

This option allows an Administrator to change the title of the process.

7.6.2.8. Reset Selectable

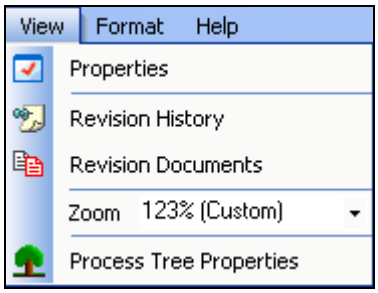
This option allows the User to change all nodes and links that were previously made un-selectable into selectable items. Items are made non-selectable on the Flags Tab of the Node Properties dialogue box.

7.6.2.9. Set Default

This stores certain properties on the currently selected Node or Link to the default values (these properties are defined in the Properties section). This operation causes these default values to be written to this Process Diagram without affecting the global defaults as specified on the Processes Tab in the Preferences Section. Different Process Diagrams can have different settings for their default node settings and their default link settings.

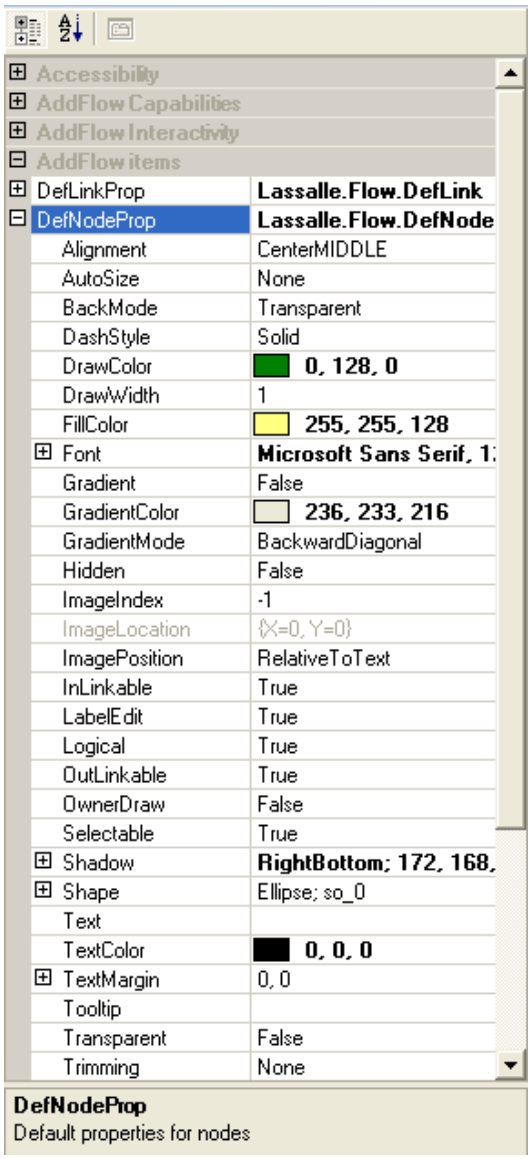
7.6.3. View Menu

This menu holds the viewing options for the process, these are described below.



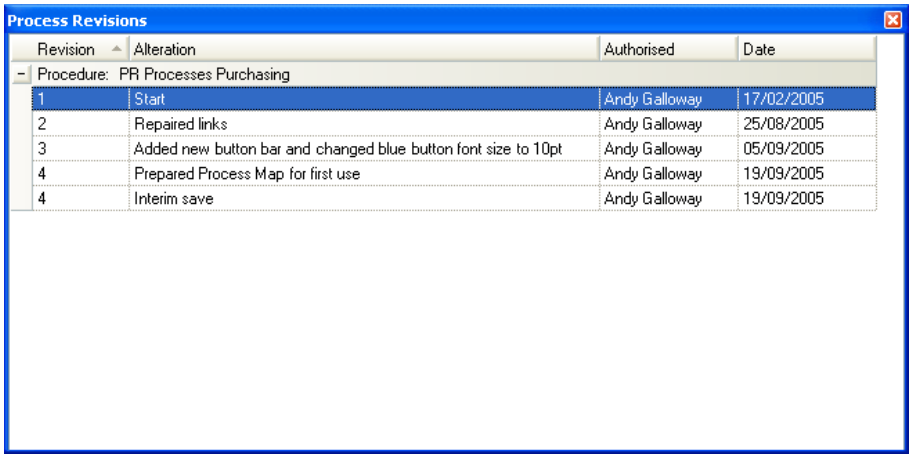
7.6.3.1. Properties

This option allows the User to gain access to all the properties available to the process. When selected, a section will open on the left hand side of the screen with a whole array of options. Only experienced Process Mappers should access these Property settings. This image shows the detail contained just in one sub-sub-section of the Properties settings.



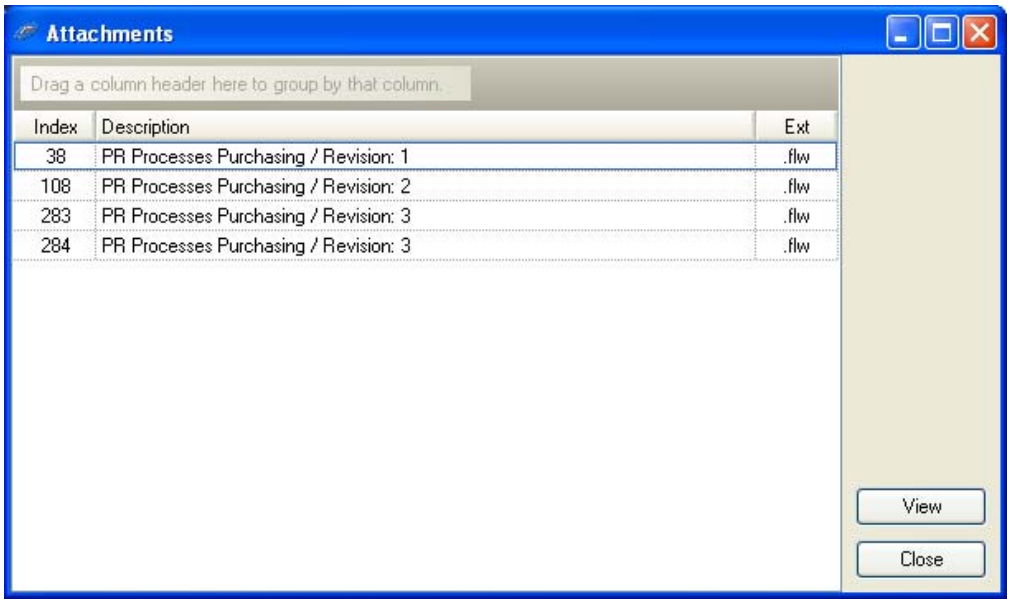
7.6.3.2. Revision History

As a Process Diagram is saved following changes, a reason must be given for these changes. Selecting this menu item brings up a dialogue box where the text entered can be viewed. You can also monitor who made the changes and when. The revision number is the one used to control Process Training Updates and is printed at the foot of each document as it is printed out.


Process Revisions
Revision
Alteration
Authorised
Date
Procedure: PR Processes Purchasing
1 Start Andy Galloway 17/02/2005
2 Repaired links Andy Galloway 25/08/2005
3 Added new button bar and changed blue button font size to 10pt Andy Galloway 05/09/2005
4 Prepared Process Map for first use Andy Galloway 19/09/2005
4 Interim save Andy Galloway 19/09/2005

7.6.3.3. Revision Documents

As a Process Diagram is saved following changes, the “old” document is saved to the “Attachments” subfolder. Selecting this menu option brings up a dialogue box where these older versions can be viewed using the “View” button. Selecting the “View” button shows the old version in its own dialogue box.


Attachments
Drag a column header here to group by that column.
Index
Description
Ext
38 PR Processes Purchasing / Revision: 1 .flw
108 PR Processes Purchasing / Revision: 2 .flw
283 PR Processes Purchasing / Revision: 3 .flw
284 PR Processes Purchasing / Revision: 3 .flw
View
Close

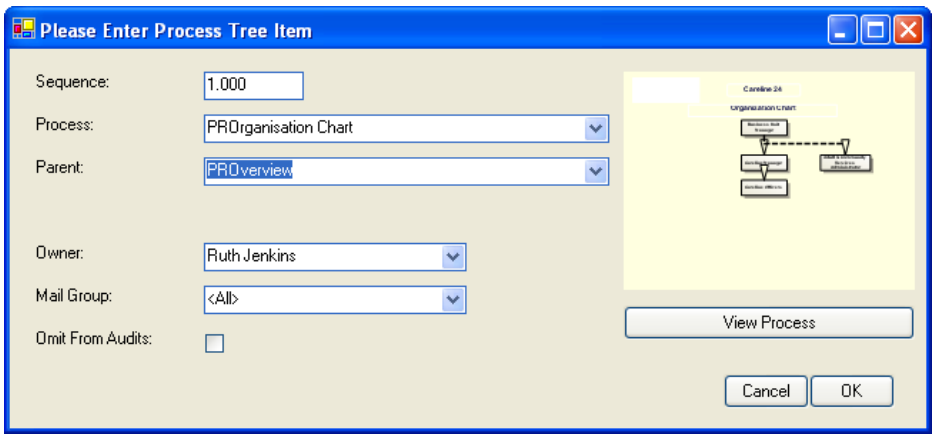
7.6.3.4. Zoom

This option allows the User to shrink or grow the process map to fit on the screen or printer page. Several options are available, these are

Size	Description
50%	Shrinks the Process Map to half size (Width and Height)
75%	Shrinks the Process Map to 75% size
100%	The Process Map is displayed at Full size (Relative to a 1024x768 Resolution)
150%	Expands the Process Map to 150% size
200%	Expands the Process Map to 2x size
Custom	Allows the User to select any zoom factor from 1% upwards

7.6.3.5. Process Tree Properties

Selecting this option brings up the following screen, which takes data from the Process Tree subrecord in the Data Centre:

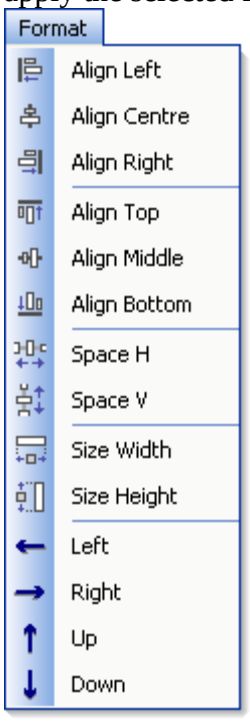


The process can be linked to its parent process by selecting the relevant option from the drop down list and details such as the Process Owner and Mail Group can be entered.

When a process form name is changed the Process Tree will be updated automatically. This will also occur when a new process is created.

7.6.4. Format Menu

This menu holds all the formatting options used in the Process Centre. These formatting options apply the selected format of the Reference Node to all of the Target Nodes.



7.6.4.1. Align Left

Upon selecting a group of nodes the User can vertically align all the left-hand edges of the Target Nodes (black handles) with the left-hand edge of the Reference Node (white handles).

7.6.4.2. Align Centre

Upon selecting a group of nodes the User can vertically align all the centres of the Target Nodes (black handles) with the centre of the Reference Node (white handles).

7.6.4.3. Align Right

Upon selecting a group of nodes the User can vertically align all the right-hand edges of the Target Nodes (black handles) with the right-hand edge of the Reference Node (white handles).

7.6.4.4. Align Top

Upon selecting a group of nodes the User can horizontally align all the top edges of the Target Nodes (black handles) with the top edge of the Reference Node (white handles).

7.6.4.5. Align Middle

Upon selecting a group of nodes the User can horizontally align all the middles of the Target Nodes (black handles) with the middles of the Reference Node (white handles).

7.6.4.6. Align Bottom

Upon selecting a group of nodes the User can horizontally align all the bottom edges of the Target Nodes (black handles) with the bottom edge of the Reference Node (white handles).

7.6.4.7. Space H

Upon selecting a group of nodes this option evenly spaces the nodes horizontally, taking the leftmost node as the Reference Node. The User is asked the number of pixels between each node. The default for this is 10 pixels. The spacing must be greater than 1 pixel.

7.6.4.8. Space V

Upon selecting a group of nodes this option evenly spaces the nodes vertically, taking the top node as the Reference Node. The User is asked the number of pixels between each node. The default for this is 10 pixels. The spacing must be greater than 1 pixel.

7.6.4.9. Size Width

All Target Nodes (black handles) are resized in width to that of the Reference Node (white handles).

7.6.4.10. Size Height

All Target Nodes (black handles) are resized in height to that of the Reference Node (white handles).

7.6.4.11. Nudge Left

Upon selecting a node or group of nodes the User can nudge each of those nodes to the left by one pixel.

7.6.4.12. Nudge Right

Upon selecting a node or group of nodes the User can nudge each of those nodes to the right by one pixel.

7.6.4.13. Nudge Up

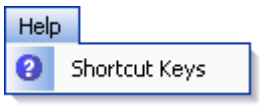
Upon selecting a node or group of nodes the User can nudge each of those nodes upwards by one pixel.

7.6.4.14. Nudge Down

Upon selecting a node or group of nodes the User can nudge each of those nodes downwards by one pixel.

7.6.5. Help Menu

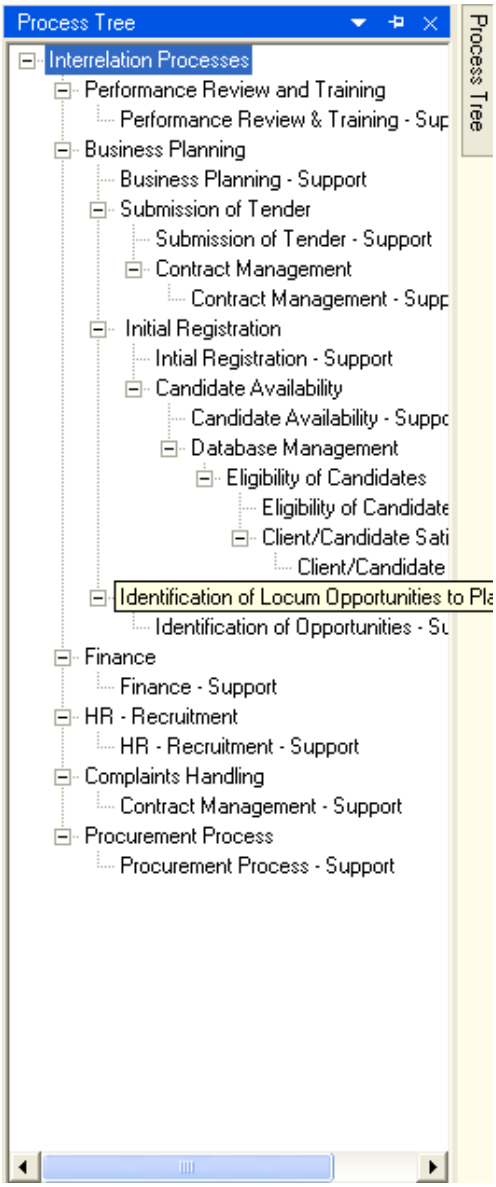
At present the help menu holds only one option, which is to display the shortcut key dialog box. This informs the User of the keyboard shortcuts available within edit mode.



For a full list of the shortcuts see Keyboard Shortcuts

7.6.6. Process Tree Menu

This option allows a user to display and navigate through the list of processes, which have been added to the Data Centre via the Process Tree subrecord.


Process Tree
Process Tree
Interrelation Processes
Performance Review and Training
Performance Review & Training - Sup
Business Planning
Business Planning - Support
Submission of Tender
Submission of Tender - Support
Contract Management
Contract Management - Supp
Initial Registration
Intial Registration - Support
Candidate Availability
Candidate Availability - Suppo
Database Management
Eligibility of Candidates
Eligibility of Candidate
Client/Candidate Sati
Client/Candidate
Identification of Locum Opportunities to Pl
Identification of Opportunities - Su
Finance
Finance - Support
HR - Recruitment
HR - Recruitment - Support
Complaints Handling
Contract Management - Support
Procurement Process
Procurement Process - Support

7.7. Button Bars

7.7.1. New

Pressing this button is the same as accessing the File Menu, New option.

7.7.2. Open

Pressing this button is the same as accessing the File Menu, Open option.

7.7.3. Save

This button is the same as accessing the File Menu, Save option.

7.7.4. Page Setup

Pressing this button is the same as accessing the File Menu, Page Setup option.

7.7.5. Print Preview

Pressing this button is the same as accessing the File Menu, Print Preview option.

7.7.6. Home

Pressing this button closes the Process Centre and returns the User to the Dolphin Main Page.

7.7.7.

Close

Pressing this button closes the Process Centre and returns the User to the area that was open prior to opening the Process Centre.

7.7.8. Undo

Pressing this button is the same as accessing the Edit Menu, Undo option.

7.7.9. Cut

Pressing this button is the same as accessing the Edit Menu, Cut option.

7.7.10. Copy

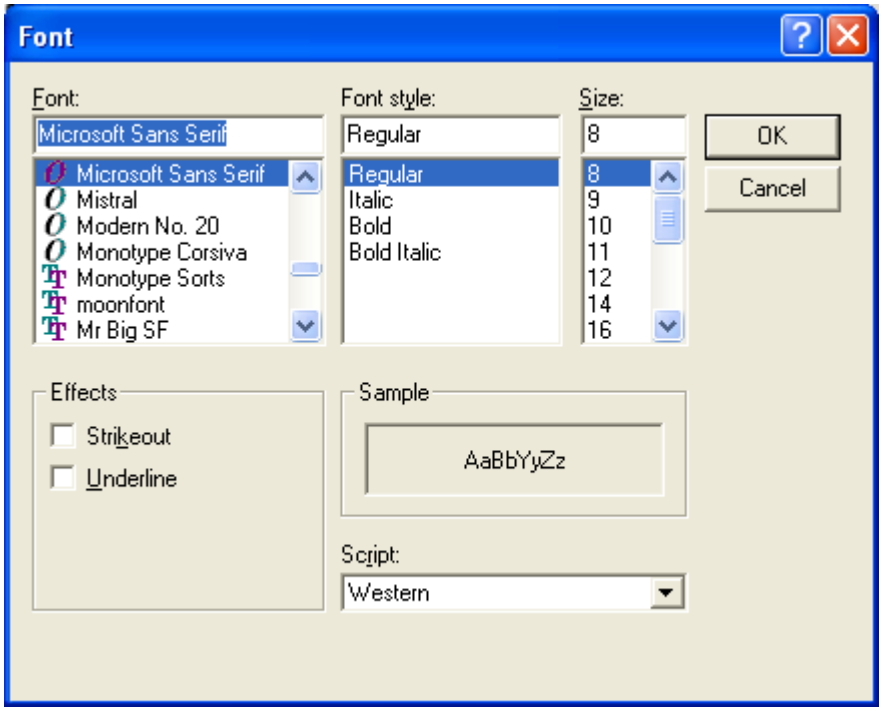
Pressing this button is the same as accessing the Edit Menu, Copy option.

7.7.11. Paste

This button is the same as accessing the Edit Menu, Paste option.

7.7.12. Change Font

Pressing this button opens the Font amendment dialogue box. This option allows the font face, size, attributes and colour of all selected Nodes or Links to be changed at the same time.



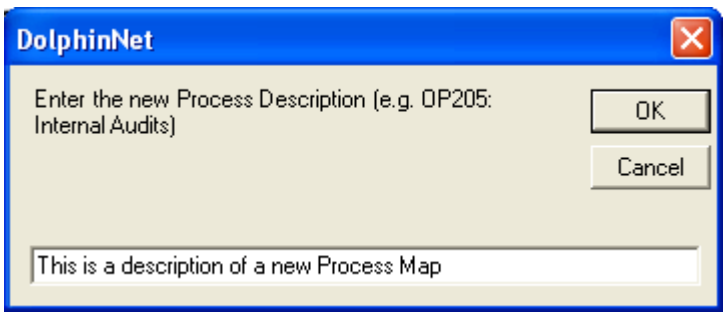
Clicking on the “OK” button gives a confirmation that the font on the selected Nodes and Links has been changed to the font selected in the Font dialogue box.

7.7.13. Change Edit Mode

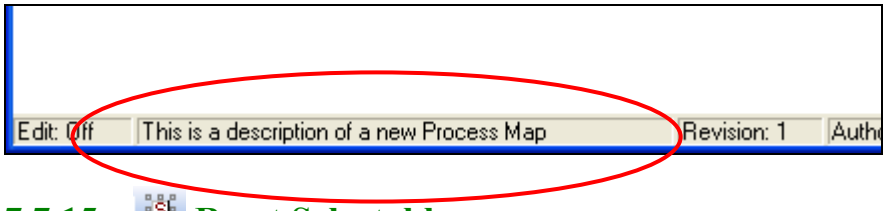
Pressing this button is the same as accessing the Edit Menu, Change Edit Mode option.

7.7.14. Change Form Name

Pressing this button is the same as accessing the Edit Menu, Change Form Name option.


DolphinNet
Enter the new Process Description (e.g. OP205: Internal Audits)
OK
Cancel
This is a description of a new Process Map

Clicking on the “OK” button saves the new description to the description area of the Status Bar. This is the title that will print at the top of the page if you were to print out a Process Diagram.



7.7.15. Reset Selectable

Pressing this button is the same as accessing the Edit Menu, Reset Selectable option.

7.7.16. Set Defaults

Pressing this button is the same as accessing the Edit Menu, Set Defaults option.

7.7.17. Back

When navigating from one process diagram to another, whether through links or by using the File Menu, Open command, you can return to the last “registered” Process Diagram by clicking on the Back Button. (Not all Process Diagrams get “registered” in the history log of the Process Centre, a Process Diagram gets registered in the history log, or not, depending on how it was opened or accessed). The last Process registered in the History Log can be found in the bottom right hand corner of the Status Bar.

7.7.18. Properties

Pressing this button is the same as accessing the View Menu, Properties option.

7.7.19. Revision History

Pressing this button is the same as accessing the View Menu, Revision History option.

7.7.20. Old Process Map Revisions

Pressing this button is the same as accessing the View Menu, Old Process Map Revisions option.

7.7.21. Zoom

Pressing this button is the same as accessing the View Menu, Zoom option.

7.7.22. Process Tree Properties

Pressing this button is the same as selecting the View Menu and then Process Tree Properties.

7.7.23. Align Left

Pressing this button is the same as accessing the Format Menu, Align Left option.

7.7.24. Align Centre

Pressing this button is the same as accessing the Format Menu, Align Centre option.

7.7.25. Align Right

Pressing this button is the same as accessing the Format Menu, Align Right option.

7.7.26. Align Top

Pressing this button is the same as accessing the Format Menu, Align Top option.

7.7.27. Align Middle

Pressing this button is the same as accessing the Format Menu, Align Middle option.

7.7.28. Align Bottom

Pressing this button is the same as accessing the Format Menu, Align Bottom option.

7.7.29. Space Apart Horizontally

Pressing this button is the same as accessing the Format Menu, Space H option.

7.7.30. Space Apart Vertically

Pressing this button is the same as accessing the Format Menu, Space V option.

7.7.31. Size Width

Pressing this button is the same as accessing the Format Menu, Size Width option.

7.7.32. Size Height

Pressing this button is the same as accessing the Format Menu, Size Height option.

7.7.33. Nudge Left

Pressing this button is the same as accessing the Format Menu, Nudge Left option.

7.7.34. Nudge Right

Pressing this button is the same as accessing the Format Menu, Nudge Right option.

7.7.35. Nudge Up

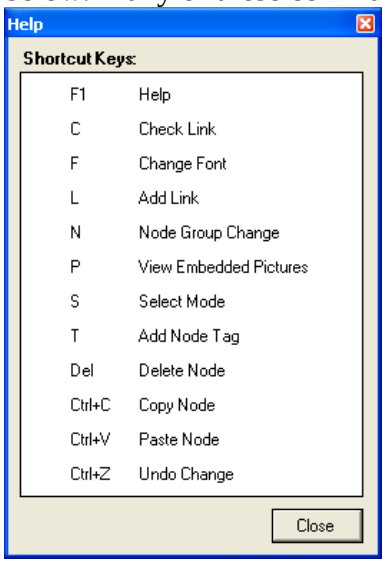
Pressing this button is the same as accessing the Format Menu, Nudge Up option.

7.7.36. Nudge Down

Pressing this button is the same as accessing the Format Menu, Nudge Down option.

7.8. Keyboard Shortcuts

In Edit mode, select a Node or a Link and press the relevant button on your keyboard from the list below. Many of these commands work with multiple Nodes or Links selected.



7.8.1. Help

F1 Calls up this menu.

7.8.2. Check Link

This option checks the link by opening the target document or process diagram in a temporary window.

7.8.3. Change Font

This option allows the font face, size, attributes and colour of all selected Nodes or Links to be changed at the same time.

This option is the same as clicking on the “Change Font” button on the button bar.

7.8.4. Additional shortcuts

Ctrl+N = New document
Ctrl+O = Open Document
Ctrl+P = Print Document
Ctrl+S = Save Document
Ctrl+Shift+S = Save As…
Ctrl+Shift+Z = Redo
Alt+Q = Quit

7.8.5. Add Link

Access the Link Properties functionality to create a link to another Process Diagram, an internal or external document, other Centres within Dolphin or any other programme or file on any accessible computer or other file system.

7.8.6. Node Group Change

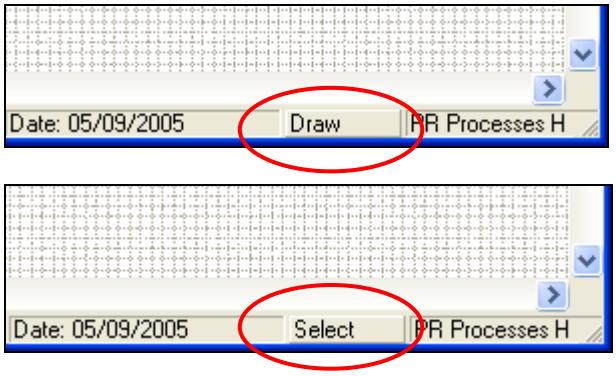
This option allows the Node Properties of all selected Nodes to be changed at the same time i.e. multiple Node Properties can be changed at the same time.

7.8.7. View Embedded Pictures

The way that the Process Centre uses images means that images must be “Registered” in the system. All registered images are

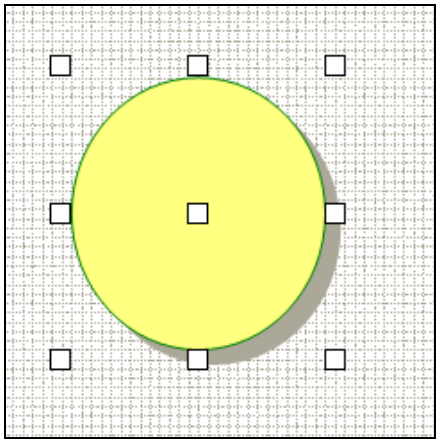
7.8.8. Select Mode

In the Edit Mode, pressing the “S” key on your keyboard toggles between “Draw Mode” and “Select Mode”



7.8.8.1. Draw Mode

In draw mode, describing a rectangle on the Process Centre canvas (drawing area) creates a new Node of the size and in the position specified by the rectangle described. This rectangle, and therefore the resultant Node, lines up with the Grid as specified in Preferences.



The Node Properties of the newly created Node are the default properties as set either in Preferences or as specified for that Process Diagram if updated either under the Edit Menu Set Default option or by using the Set Default button.

Once a Node has been created, it can be updated as per the Edit Process Diagrams section.

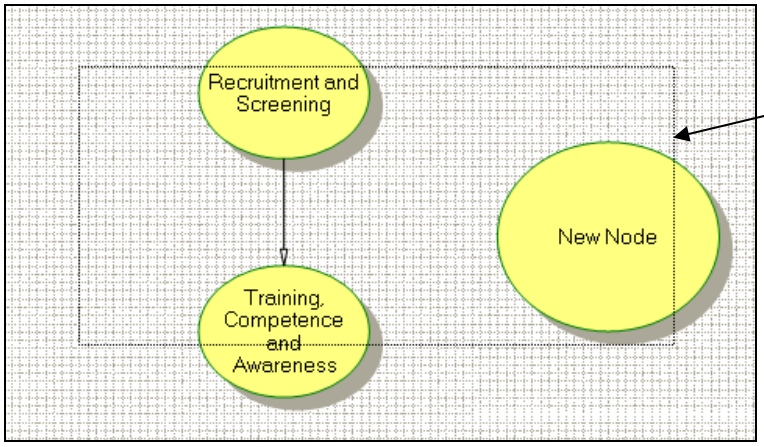
7.8.8.2. Select Mode

In Select Mode, nodes and links can be selected for editing, linking, resizing, aligning, moving, etc. Some operations can only be performed on one Node or Link at a time, even if many Nodes are selected. Other operations are carried out on all Nodes or Links that are selected.

There are two ways to select multiple Nodes or Links:

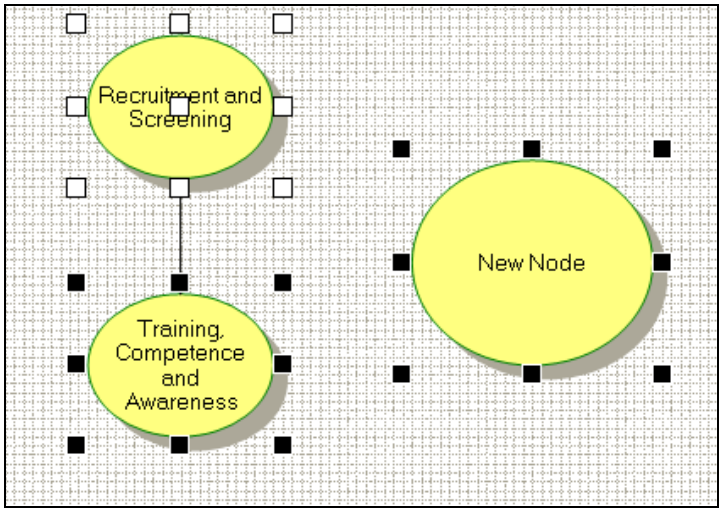
Select an Area

Many Nodes can be selected by describing a rectangle on the Process Centre canvas (drawing area) to take in all the nodes or Links that the rectangle touches or encompasses.



Described rectangle defining the capture area

This will result in all these Nodes being added to the selection with the first one in the selection as the Reference Node.



Other Nodes can be added to the selection using the "Individual Selection" method described below. Similarly, selected Nodes can be removed from the selection. To select a different Reference Node, deselect and then reselect the Reference Node. Do this until the correct Node is shown as the Reference Node.

Individual Selection

Individual Nodes and Links can be added to or removed from a selection of Nodes or Links by holding down the Control key on your keyboard and clicking the Node or Link to add to or remove

from the selection. To add all the Nodes in an area to a selection, hold the Control key on your keyboard and drag a rectangle to cover the area over the Nodes (See "Select an Area" above)

Where the selected actions make reference to a reference Node or Link, the reference is the Node or Link with the white handles, the target Nodes or Links are those with black handles.

7.8.9. Add Node Tag

This option is only in version 2.2.0.9 to maintain backwards compatibility with earlier versions of Dolphin. All functionality under this option is available under the "Add Link" option.

7.8.10. Del

Selecting a node and then choosing the "delete" button will allow the user to delete the node.

7.8.11. Ctrl+C

Selecting a node and then holding "Ctrl" and "C" at the same time will copy the node.

7.8.12. Ctrl+V

Click the cursor on the process map page and then choose "Ctrl" and "V" to paste the node copied as described above.

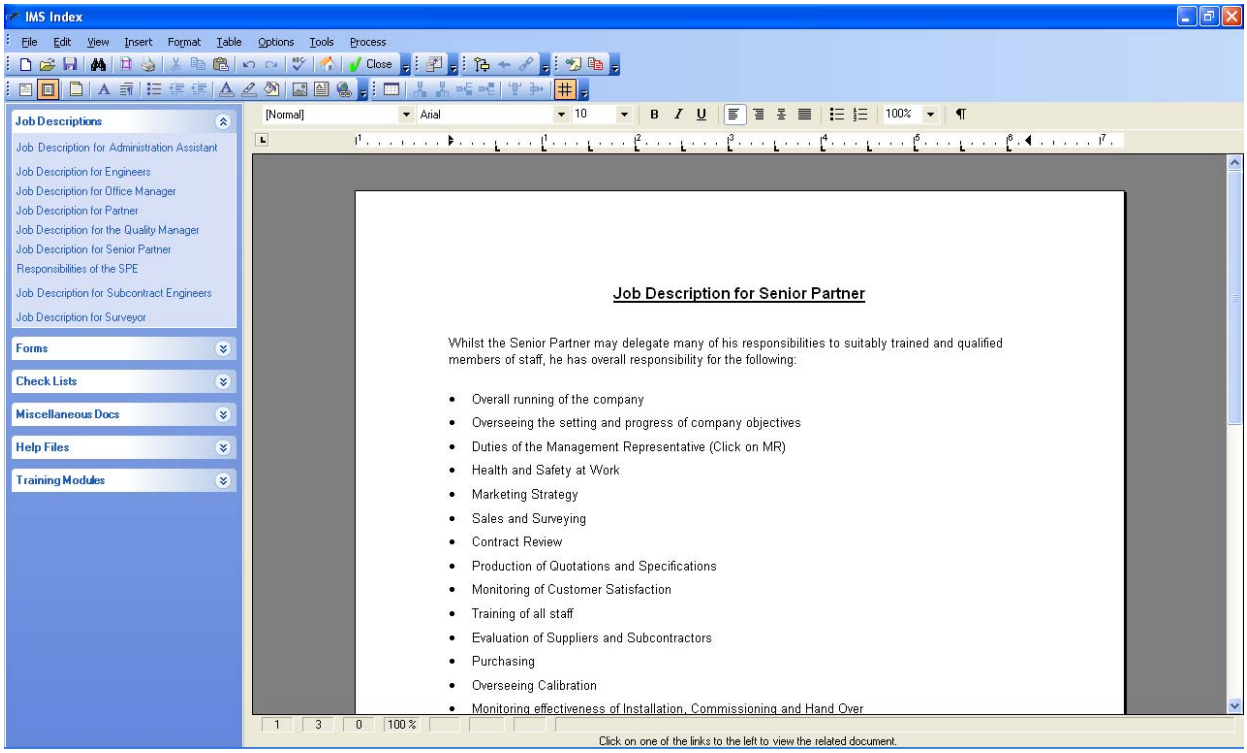
7.8.13. Ctrl+Z

Selecting "Ctrl" and "Z" at the same time will allow the User to undo the last action carried out, e.g. if a node was copied in error this function will allow the "copy" to be undone.

Chapter 8. IMS Centre

8.1. Introduction to the IMS Centre

The IMS Centre is the heart of the documentation control functions within Dolphin. As well as ensuring that the correct documents are available at the point of use, the IMS Centre tracks revision changes and only allows authorized personnel to make changes to controlled documents.


IMS Index
File Edit View Insert Format Table Options Tools Process
Close
Job Descriptions
Job Description for Administration Assistant
Job Description for Engineers
Job Description for Office Manager
Job Description for Partner
Job Description for the Quality Manager
Job Description for Senior Partner
Responsibilities of the SPE
Job Description for Subcontract Engineers
Job Description for Surveyor
Forms
Check Lists
Miscellaneous Docs
Help Files
Training Modules
[Normal]
Arial
10
100%
Job Description for Senior Partner
Whilst the Senior Partner may delegate many of his responsibilities to suitably trained and qualified members of staff, he has overall responsibility for the following:
Overall running of the company
Overseeing the setting and progress of company objectives
Duties of the Management Representative (Click on MR)
Health and Safety at Work
Marketing Strategy
Sales and Surveying
Contract Review
Production of Quotations and Specifications
Monitoring of Customer Satisfaction
Training of all staff
Evaluation of Suppliers and Subcontractors
Purchasing
Overseeing Calibration
Monitoring effectiveness of Installation, Commissioning and Hand Over
Click on one of the links to the left to view the related document.

8.1.1. IMS Centre Overview of Capabilities

8.1.1.1. Common Word Processing Features

Feature	Feature Description
Bullets and Numbered Lists	Bullets and numbered lists can be inserted, incremented and numbered using the built in dialog box.
Character and Paragraph Formatting	Rich character and paragraph formatting is standard in all editions. All formatting options expected from a word processor are available.
Clipboard Operations	All clipboard operations are built in. ASCII and RTF are used for maximum interoperability.
Find and Replace	Find and replace functions are available from built-in dialog boxes and programmatically, so that it can be used without end-user interaction.
Headers and Footers	Accessible from a built in dialog box, headers and footers can be created, loaded from and saved to MS Word or RTF files.
Hypertext Links	Hyperlinks can be defined within a Dolphin IMS Centre document, loaded from and saved to HTML files.

Feature	Feature Description
Images	Images can be positioned as characters or given a specific page position. Text flow around images can be set directly or from program code. Images are scalable.
Loading from and saving to databases	Read from and write to databases, independent of the type of database or interface, using all formats supported by the Dolphin IMS Centre.
Multi-Level Undo / Redo	There are multiple levels of undo and redo within Dolphin IMS Centre Documents, providing an easy path to correct mistakes.
Page and Document Settings	Page settings define the on-screen display of a document. Document settings include page size, orientation, margins etc.
Printing and Print Preview	Printing and print preview are available, complete with graphics, tables, page numbers, headers and footers, etc.
Spell Checking	Dolphin spell checker provides 3 spelling components; a dialog based checker control, an as you type check control and a core spell checker. Spell checking functionality is exactly as in Microsoft Word.
Stylesheet Formatting	All documents formatting can be stored in stylesheets. Stylesheets can be defined using the built in dialog boxes or from program code.
Tables	Tables can be inserted into documents. Cell contents can contain virtually any kind of formatting. Borders and shading can be set for individual cells.
Text Frames	Freely placeable and programmable text frames can be inserted and positioned as a character or geometrically relative to a paragraph or a page.
Zooming	End-users can zoom in and out in steps of 1% - from 10% up to 400%. All word processing functions are available at all zoom levels.

8.1.1.2. Advanced Programming Capabilities

Feature	Feature Description
Control Settings	Control settings are available to set border styles, pagination, scrollbar and many more document appearance and behavior characteristics.
Line and Character Operations	Line operations give access to statistics such as number of characters in a line of text or the number of lines in a document.
Marked Text Fields	Marked text fields enable integration of applications such as mail merge, where for example, (formatted) text is retrieved from a database.
Toolbars	Fully featured status bar, button bar and ruler are included in the Dolphin IMS Centre.

8.1.1.3. Localization (Additional Languages)

Feature	Feature Description
Multi-Language Support	The Dolphin IMS Centre can be programmed to display in English, German, French, Spanish and Italian. All dialog boxes can be localized quickly and easily by the developer.
Unicode	The Dolphin IMS Centre offers full Unicode support, thus building applications for eastern languages is as simple as for the English / European languages.

8.1.1.4. Supported File Formats

Feature	Feature Description
Portable Document Format (PDF)	Export directly to PDF with no further software or third party printer drivers. Exporting to PDF is as easy as saving to DOC, RTF etc.
Hypertext Markup Language (HTML)	HTML documents and be loaded and saved, just as easily as other file formats. Use The Dolphin IMS Centre to create true Intranet and Internet applications.
Image Formats	Most popular image file formats are supported. Amongst others: TIFF, WMF, BMP, JPEG, PNG, and GIF.
Microsoft Word (DOC)	Load and save documents from and to DOC format. All Word versions from v6, WordPad to Word XP are supported.
Rich Text Format (RTF)	RTF offers unmatched interoperability with other word applications. Load and save documents to and from RTF.

8.1.1.5. Supported Programming Languages

Feature	Feature Description
Microsoft C# .NET (VS 2002, 2003)	The Dolphin IMS Centre is a Windows Forms control that has been designed from scratch for the Visual Studio .NET framework.
Microsoft Visual Basic .NET (VS 2002, 2003)	The Dolphin IMS Centre is a Windows Forms control that has been designed from scratch for the Visual Studio .NET framework.

The main elements of the IMS Centre are:

- The Explorer Bar
- Button Bars
- Menus
- Document Panel

8.2. Explorer Bar

The Explorer Bar is fully customizable to provide Quick Links to groups of documents that are contained within Dolphin. The User can set up the Group Headings and attach different documents within each group by using the Edit Document Links button or select “Links” from the “Edit” menu option.

Many buttons in the IMS Centre are programmed as “Windows Standard”. This means that “Open”, “Cut”, “Paste”, etc within the IMS Centre act in exactly the same way as they do in all other Windows programmes. The following explanations have been provided for the Dolphin specific functions and features:

8.2.1. Using the Explorer Bar

When you first enter the IMS Centre, the Explorer Bar displays in one of two states, fully expanded or fully closed. The state is selected within the Preferences section of the Main Page.

8.2.1.1. Fully Expanded Explorer Bars

To start all Explorer Bars fully expanded, select the “Start Expanded” option in Preferences on the Main Page. Once selected this becomes active the next time you log in to Dolphin.

If the “Only One Expanded” option is selected also, then the first Group on any Explorer Bar is the only group that is expanded at start up. Clicking on the expanded group will close it.

8.2.1.2. Only One Group Expanded in Explorer Bars

To start all Explorer Bars fully closed un-tick the “Start Expanded” option in Preferences on the Main Page. Once selected this becomes active the next time you log in to Dolphin.

If the “Only One Expanded” option is selected, then only the selected Group on any Explorer Bar is expanded. Opening another Group causes the expanded group to close before the newly selected group will expand. Clicking on the expanded group will close it.

8.3. Button Bars

8.3.1. New IMS Document

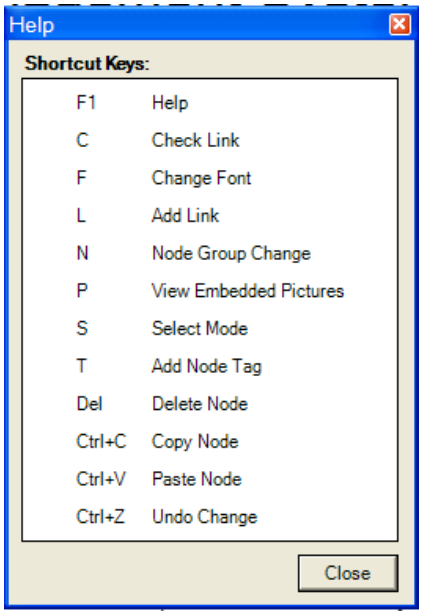
This button will clear the document currently being viewed in the Document Panel and prepare a blank page. With the correct permissions, the User can then create a document and print, export or save the file. When saving for the first time, the User is asked for the file title, file name and a reason for saving. This not only saves the document to the Docs subfolder, but also primes the IMS Centre for displaying and controlling the document.

8.3.2. Open IMS Document

Clicking on this button will open a dialogue box in which you can navigate to where the file that you want to open is located. This option starts in the “Docs” subfolder. Documents that are either Rich Text Format (RTF) or Word Documents (DOC) will open in the IMS Centre. All other file types, e.g. PDF, Excel, etc., will open in the appropriate programme, i.e. PDF will open in Adobe Acrobat Reader. Even if a document is not listed in the IMS Centre Explorer Bar, they can be opened, exported and saved from the IMS Centre.

Dolphin will also recognise that the new document does not have an entry in the explorer bar and asks if you want to create one. This allows a user to assign the document to the relevant group as described below.

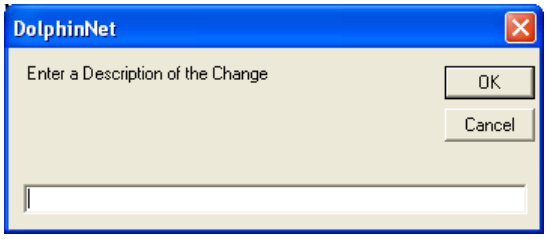
8.3.3. Shortcuts



F1 Help
C Check Link
F
Ctrl+N = New document
Ctrl+O = Open Document
Ctrl+P = Print Document
Ctrl+S = Save Document
Ctrl+Shift+S = Save As…
Ctrl+Shift+Z = Redo
Alt+Q = Quit

8.3.4. Save IMS Document

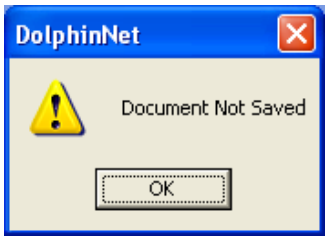
Using this button allows the document to be saved. If there have been no changes to the document since it was last saved, there will be no requirement to provide a reason for saving. However, because all documents are controlled, if the document has changed the first thing the system requires is a description of the change. This description will be recorded on the "Revision History" for this document and the original document is added to the "Old Revision Attachments" feature.



Entering a reason for the change and clicking on the "OK" button.

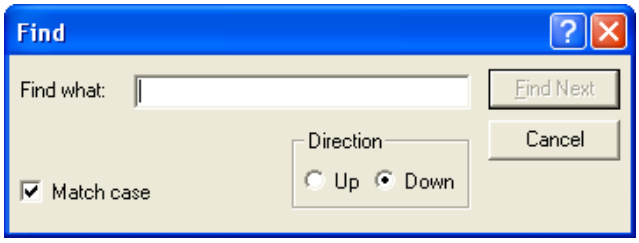
Clicking on the “Cancel” button causes the save routine to be aborted and a message box appears reminding you that the changes to the document were not saved.

The save as routine will generate an email (if Dolphin Event Checker set up) top notify all users of the change (s) to the document. A description of the change is included in the mail.



8.3.5. Find Item this document

Selecting this feature allows you to search the document that is open in the Document Panel for any text string. Clicking on the button opens a dialogue box for you to input the text string to be searched for, the direction of the search and whether to case of the text is important or not.

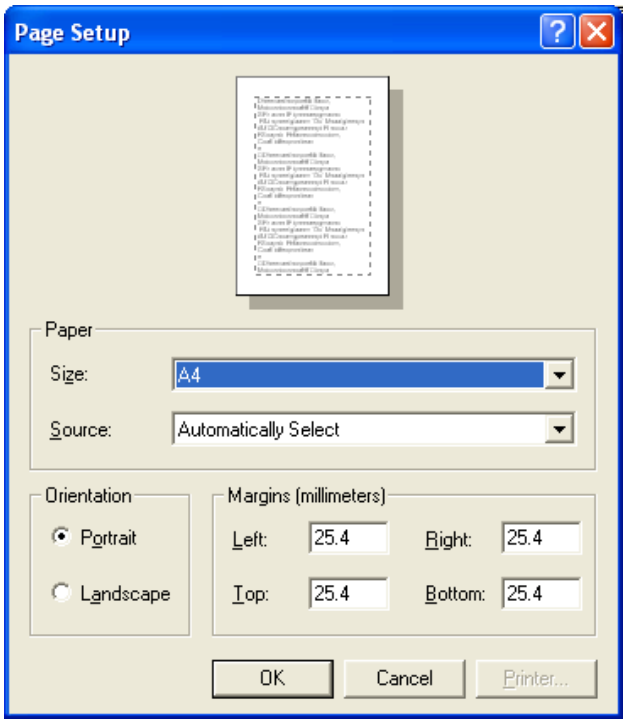


Clicking on the “Find Next” button finds the next instance of that text in the search direction from where the insertion point is currently in the document. This operation can be repeated until the beginning or the end of the document is reached, depending on the search direction selected. When there are no more instances of the search text to find, the User gets one of the following warning messages. For a text search in the “Down” direction:

For a text search in the “Up” direction:

8.3.6. Page Set Up

Clicking on the Page Set Up button opens the Page Setup dialogue box. In it, you can select various items to do with preparing the document for correct viewing on the screen and for printing out. Once changes have been made, click on OK. These settings are associated to that document only. Due to the Dolphin footer, which is automatically present on all IMS documents a page margin of less than 25.4mm is not possible.



8.3.7. Print IMS Document

Because of the need for Dolphin to control documents, when they are printed they can be overprinted with various information indicating what the document is, who printed it and when, and the fact that the printed version of the document is not controlled.

Clicking on the Print button takes you to a dialogue box where the User can select the required printer. These are system printers and are set up via the printers' function of Windows. The first selected printer is the system default printer.

Select the printer including trays, types of paper, etc and press on "OK". This document will now be printed to the selected printer.

8.3.8. Print Preview

Clicking on this button causes a print preview version of the form to be generated in a window.

Print preview
Close
Page
1
Introduction to the IMS Centre
Introduction to the IMS Centre
The IMS Centre is used within Dolphin for the storage and control of documents that are "internal" to the Dolphin System. Only system administrators can amend documents and a reason for the change should be given when prompted. This reason will form part of the change history for the document.
On the left-hand panel (the Explorer Bar) there are a number of groups listed i.e. Forms, Training Modules. Clicking on this title expands and collapses the groups so that you can see the various documents within that group. Clicking on an individual document opens it up in this panel so that you can read it.
From here documents can be Exported as PDF documents, printed as an "Uncontrolled" copy, the revision history can be checked or, if a there is a link to an associated Process Map, it can be accessed by clicking on the "Go To Root Process" button on the button bar.
To learn about Documentation Control, please arrange to be trained on the training module entitled Documentation Control.
Printed By Andy Galloway on 06 Feb 2006 - UNCONTROLLED WHEN PRINTED
Page 1 of 1
Revision: 2

Note the addition of the header and footer information. This is pre-set by the Administrator in the document tab of the Preferences Section.

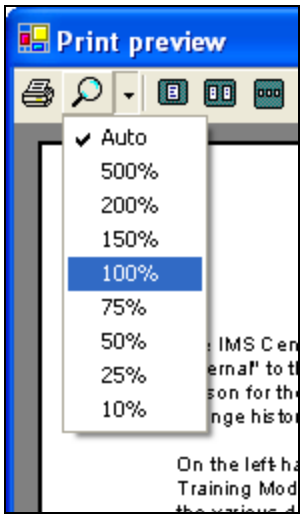
The buttons in this window are:

8.3.8.1. Print

Without further adjustment, send this image to the selected printer selected under the Print Settings above.

8.3.8.2. Zoom

Clicking on the Zoom button allows the User to select a zoom factor from 10% to 500% or Auto. 100% shows the document on the screen as actual size. Auto is the default zoom option and it displays the document in a window, altering the zoom so that the whole page is displayed in the print preview window.



8.3.8.3. One Page

This zoom option shows a single page in the print preview window.

8.3.8.4. Two Pages

This zoom option shows two pages side by side in the print preview window.

8.3.8.5. Three Pages

This zoom option shows three pages side by side by side in the print preview window.

8.3.8.6. Four Pages

This zoom option shows two rows and two columns of pages in the print preview window.

8.3.8.7. Six Pages

This zoom option shows two rows and three columns of pages in the print preview window.

8.3.8.8. Close

Pressing this button closes the Print Preview window and returns the User to the IMS Centre.

8.3.8.9. Page Numbers

Move from page to page in a multi-page document by using the spin up and spin down buttons. The number of the current page is shown in the page number window.

Alternatively, select the page number in the window and replace it with the number of the page that you wish to view. Press enter on the keyboard to go to that page.

8.3.9. Go to Home Page

This button closes the IMS Centre and reverts the focus back to the Dolphin Main Page.

8.3.10. Close IMS Centre

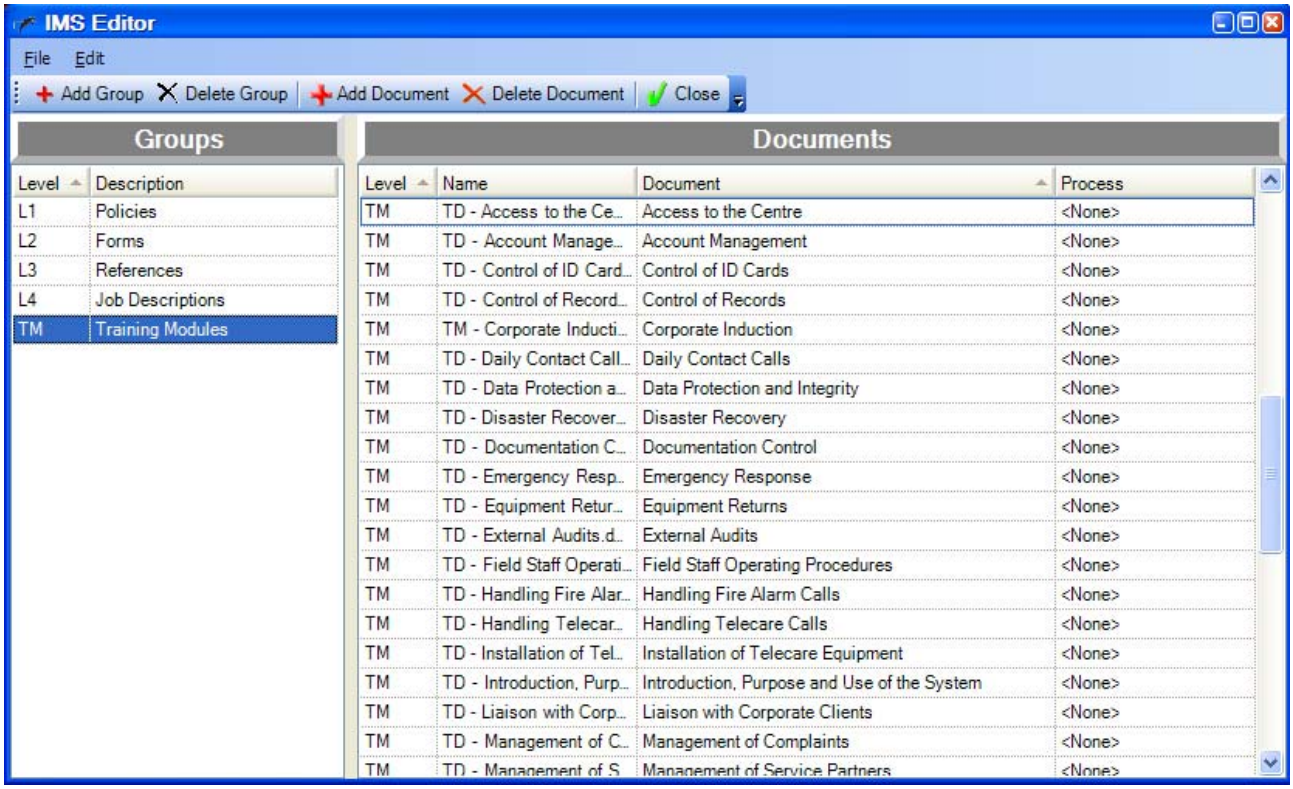
This button closes the IMS Centre and reverts the focus back to the last programme that was open i.e. the Process Centre, the Schedule Centre, etc.

8.3.11. Edit Document Links

8.3.11.1. Creating a New Group

Clicking on the "Edit Document Links" button takes you to the IMS Editor. In the left-hand panel you can designate the groups for the document families. This is done by placing the cursor in the first line below the column headers. Type a level designator from the list below in the first cell, or type in a new one, if required. In the second column you must type in the Groups' Description. The Groups "Description" field can be any text you like, but this is what will appear on the Explorer Bar, so shorter is better than longer. Then press the "Enter" key on your keyboard. This new entry will then be saved to the database.

These groups can be any designation that you want. However, it is suggested that the number of groups be kept to a minimum to aid rapid location of different families of documents. Because Dolphin must be very precise about how the Training Modules are tracked and the fact that there must be a "Level" designator for Training Modules, it is set in the "Preferences" subsection of the Main Page. Apart from that, the "Level" designator for all other groups can be any text that you like.



8.3.11.2. Linking Documents

Once the Groups have been created (they can be added to later, if necessary) it is possible to add documents to the various groups. This is done by placing the cursor in the first line below the column headers in the right-hand panel. Select the "Level" designator from the drop down list in the first cell. Tab to the second cell and select the document's file name from the drop down list of files stored in the "Docs" subfolder. In the third column you must type in the Document Title. The "Document" field can be any text you like, but this is what will appear on the Explorer Bar, so shorter is better than longer. You can link the document to a Process Map by selecting it in the fourth column. From the drop down list you will be able to choose any valid Process Map that is

listed in the “FlowCharts” subfolder. Then press the “Enter” key on your keyboard. This new entry will then be saved to the database. Additionally, a message can be added to a document, e.g. “This opens in MS Excel” so that when a user clicks on the document name on the Explorer Bar the information is displayed.

A document may be added to more than one group for ease of reference. However, one revision history will be used for the document. That is, the document remains one file, viewable in many locations.

8.3.11.3. Close IMS Editor

Clicking on the “Close” icon will close the IMS Editor and return you to the IMS Centre. Newly created links will be available for use immediately.

8.3.11.4. Deleting Document Links

Select the document to delete from the right-hand panel so that it is highlighted. Click on the “Delete Document” button. When asked, confirm the request to delete the document.

Note that deleting a document link from the IMS Editor does not delete the actual file. It just deletes the association between the document and the Group in the Explorer Bar.

8.3.11.5. Deleting Groups

Select the group to delete from the left-hand panel so that it is highlighted. Click on the “Delete Group” button. When asked, confirm the request to delete the group.

Note that a Group cannot be deleted whilst there are documents associated with that group. First delete all of the document links associated with the group that you want to delete. Where there are no documents linked to that group, the group can be deleted.

8.3.11.6. Changing Group Names

A Group Name can be changed “on the fly”. In the left-hand panel select the group that you want to rename and highlight the “Description” column. Type the new description and then press the “Enter” key on your keyboard. This new information will then be saved to the database.

8.3.11.7. Changing Document Names

A Document Description can be changed “on the fly”. In the right-hand panel select the document that you want to rename and highlight the “Document” column. Type the new description and then press the “Enter” key on your keyboard. This new information will then be saved to the database.

If you change the file name of a linked document, all references to that document name within Dolphin will automatically be updated. To change a file name, select the document that you want to rename and highlight the “Name” column in the right-hand panel. Type the new file name and then press the “Enter” key on your keyboard. This new information will then be saved to the database.

8.3.11.8. Changing Group Level ID

It is possible to change the Group Level Identifier, e.g. changing L1 to L6. Dolphin will bring up a prompt, which will ask if all documents in the selected group should be changed to the new Group Level ID.

8.3.11.9. Changing Process Links

A Document Linked Process can be changed “on the fly”. In the right-hand panel select the document that you want to rename and highlight the “Process” column. Select the new Process Map to be linked to this document from the drop down list and then press the “Enter” key on your keyboard. This new information will then be saved to the database.

8.3.12. Root Process

Clicking this button takes you to the Process Map with the file name PR01.flw. This is known as the root process by virtue of its name. If there is no Process Diagram with this name in the Live Data Area, pressing this button will generate an error message informing you that the file is missing.

8.3.13. Last Process

Clicking this button takes you to the Process Map that is open in the Process Centre or, if the Process Centre is closed, to the last Process Map viewed.

8.3.14. Linked Process

Clicking this button takes you to the Process Map that is associated to the document being viewed in the Document Panel. Processes can be associated to documents in the Edit Document Links function.

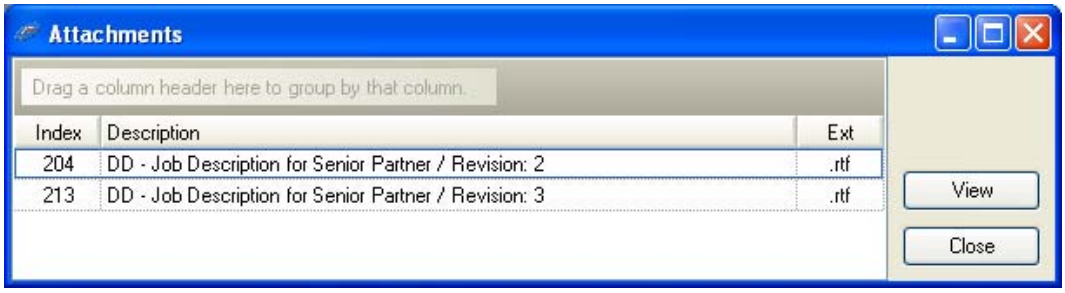
Note: Clicking this button will close the IMS Centre and open the linked process map in the Process Centre.

8.3.15. Revision History

As a document is saved following changes, a reason must be given for these changes. Pressing on this button brings up a dialogue box where the text entered can be viewed. You can also monitor who made the changes and when. The revision number is the one used to control Training Module Updates and is printed at the foot of each document as it is printed out.

8.3.16. Old Revision Attachments

As a document is saved following changes, the “old” document is saved to the “Attachments” subfolder. Pressing on this button brings up a dialogue box where these older versions can be viewed using the “View” button.



Selecting the "View" button shows the old version in its own dialogue box.

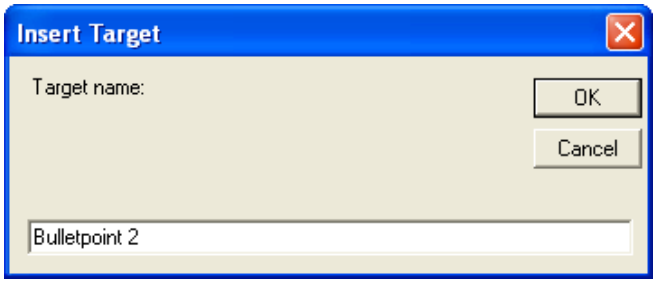
8.3.17. Hyperlinks

Hyperlinking requires two elements. The first is that "Targets" need to be set up in the destination documents. The second is that the hyperlink needs to be set up in the existing document, which, when fired will open the destination document and take you to the "Target" within that document.

8.3.17.1. Creating Targets

Open the file that will be the destination document. Scroll down the document to find the area of the document that you want to link to. This may be a phrase, a paragraph or a whole section. This will be the "Target" of the hyperlink. The Target will appear at the insertion point or, if some text is selected, at the beginning of the selected text.

Select the "Target…" option from the "Insert" menu. This gives you a dialogue box within which you can name the target.



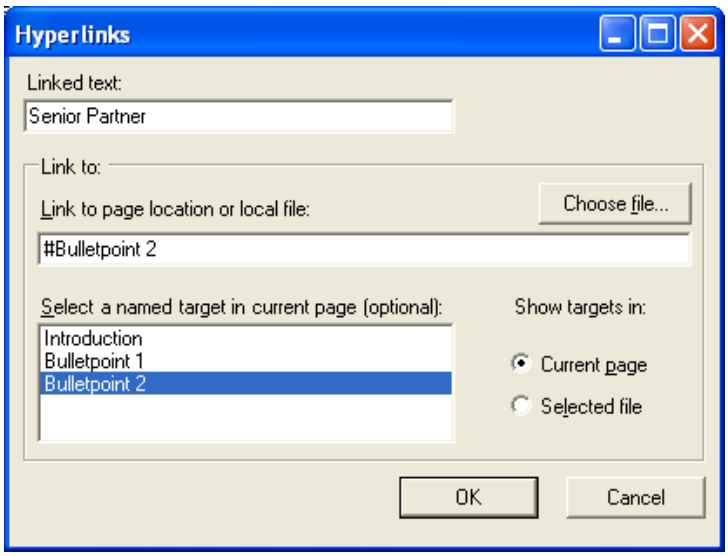
Name the target and click on “OK”. You can create many targets within one document by simply repeating the above. A target name can only be used once in each document.

8.3.17.2. Editing Targets

In a document that has “Targets” in it, positioning the insertion point at the target will allow the Edit Menu, Targets option to be selectable. Changing the Target Name and clicking on “OK” saves the new Target Name in the document. (Note that any Hyperlinks in other documents that aim at this Target will need to be reprogrammed to reflect the new Target Name. Alternatively, place an additional target alongside the original, so that both are available for Hyperlinks.)

8.3.17.3. Creating Hyperlinks

Within a document, you can select some text and click on the “Hyperlink” button. This opens up a dialogue box so that you can choose the destination document for the hyperlink.



You can create a link to another file, either within Dolphin or elsewhere, or you can link to a “Target” within this file or any other destination file.

Once you have selected the destination file using the “Choose file…” button, you can view the “Targets” in that destination File by highlighting the “Selected file” radiobutton. Selecting the “Current Page” radiobutton shows all of the “Targets” in the document that is currently open. Clicking on “OK” creates the hyperlink on the text that was selected originally.

Once the hyperlink has been created, it is fired by clicking on the text that carries the hyperlink. Doing this will cause the hyperlink to activate opening the destination file and moving the cursor to

the “Target” within that file. If there are no targets in the destination file, the file is simply opened and the cursor set to the beginning of the document.

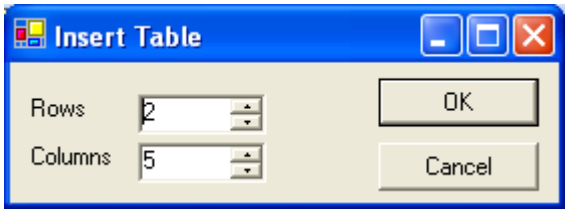
8.3.17.4. Editing Hyperlinks

Selecting the Hyperlink from the Edit Menu, Hyperlink option opens the Hyperlink dialogue box as if you were creating a Hyperlink. Changing the settings and clicking on “OK” saves the new settings for the entire hyperlink.

8.3.18. Tables

8.3.18.1. Creating Tables

Tables can be added to documents. Simply place the insertion point in the document where you want the table to appear. Then click on the “Insert Table” button. From the dialogue box, select the size of the table in rows and column numbers.



Click on “OK” to insert the table into the document at the insertion point. When the document is saved, the table is embedded into the document.

The table can be visible or not by clicking on the “Show / Hide Grid Lines” button when the insertion point is in the table.

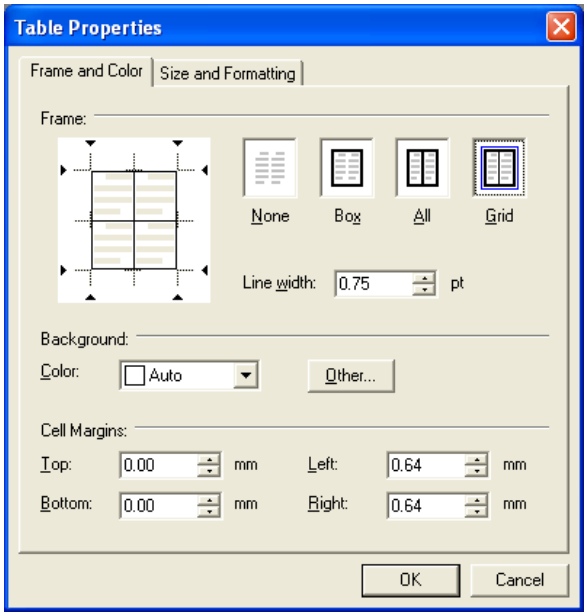
8.3.18.2. Editing Tables

With the insertion point in the table, a number of other buttons on the “Tables” buttonbar become available. Adding and deleting rows and columns are all referenced to where the insertion point is in the table.

Inserting columns is either to the left or right of the column where the insertion point is but the new column will have the same attributes as the column where the insertion point is. Inserting rows is either above or below the row where the insertion point is but the new row will have the same attributes as the row where the insertion point is. Alternatively, pressing tab when the cursor is in the last cell in the table will add a new row at the bottom of the table.

Deleting rows or columns deletes the row or column where the insertion point is.

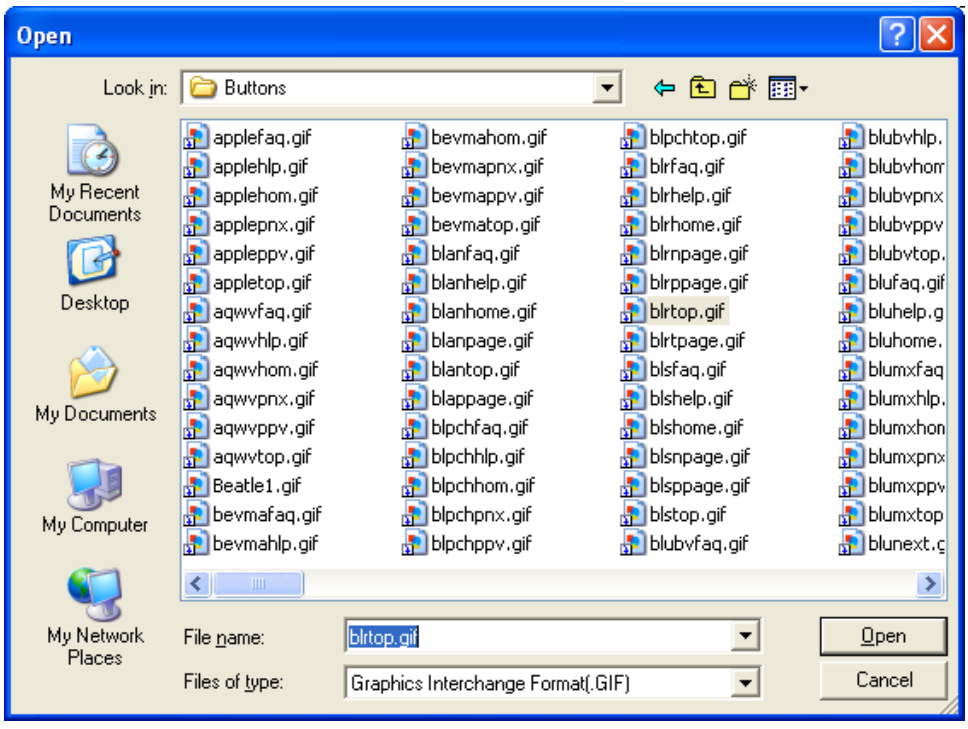
Tables can also be edited using the “Properties…” option from the “Tables” menu or from within the table, right click and select “Table Properties” from the pop up menu. This will give you a dialogue bow wherein you can change many of the attributes of the table, such as the grid that would be showing, line thickness and colour, cell margins, cell height, vertical alignment and whether rows are aloud to break across pages.



8.3.19. Images

8.3.19.1. Adding Images

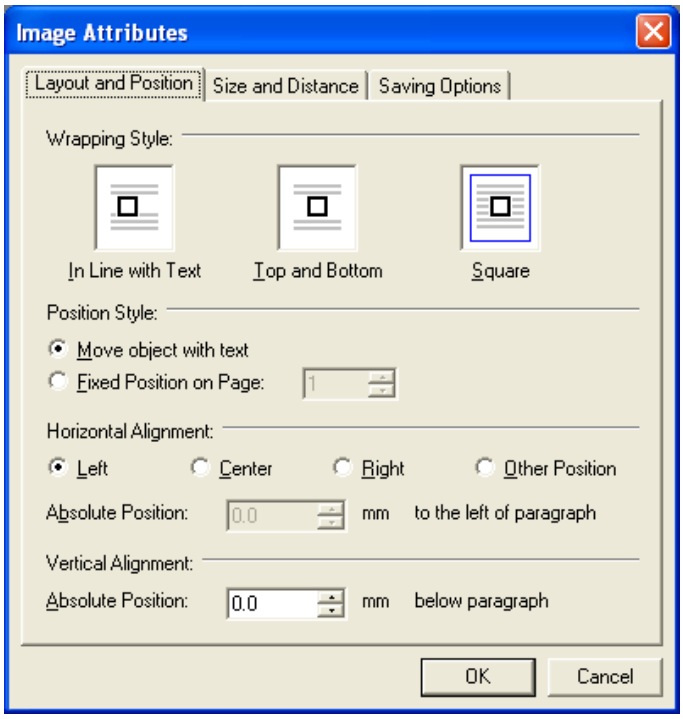
Images can be added to documents. These images do not have to be registered in the same way that Process Map images have to registered and indexed. Simply place the insertion point in the document where you want the image to appear. Then click on the “Insert Image” button. From the dialogue box, select the image that you want in the document and click on “Open”. The image will appear in the document at the insertion point. When the document is saved, the image is embedded into the document.



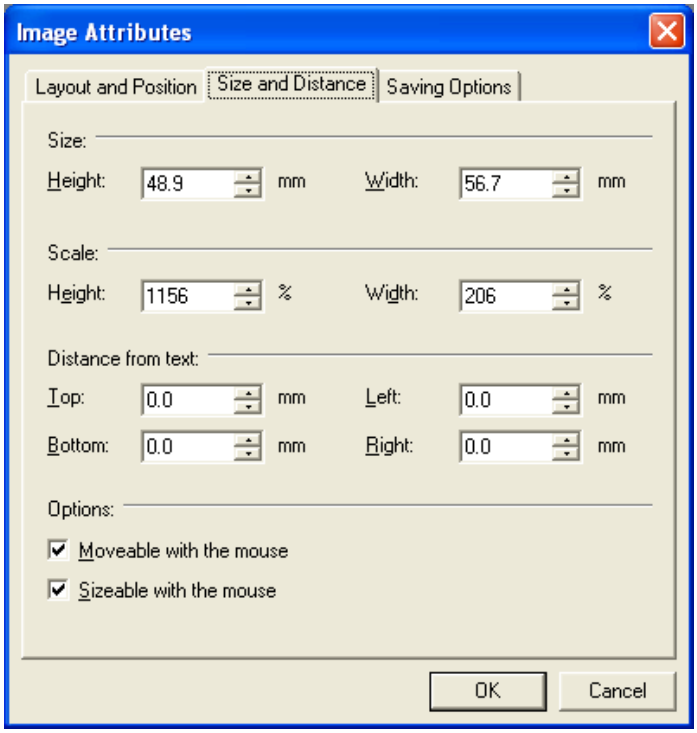
8.3.19.2. Editing Images

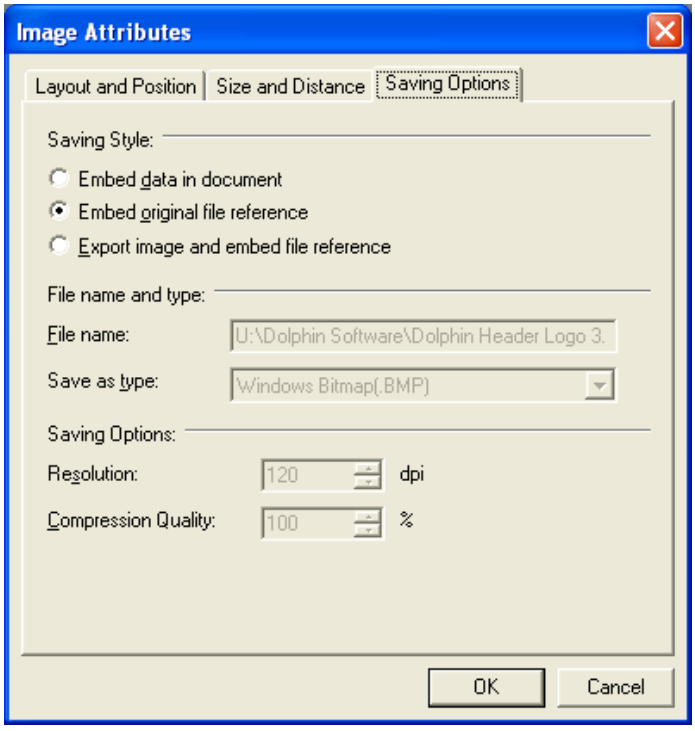
Images can be resized by selecting the image, which creates sizing handles. Grab a handle by clicking on it and dragging it. This will cause the document to resize. To maintain the ratio between height and width, use the corner sizing handles.

Images can be formatted by selecting the image and right clicking. Select “Image Properties” from the pop up menu. Alternatively, select “Image…” from the “Format” menu. This brings up a dialogue box where you can alter the properties of the highlighted image.



The three tabs available give you options for the layout and position, size and distance and saving options.





8.3.19.3. Deleting Images

To delete an image, simply select it and press the delete key on your keyboard.

8.4. Menus

Many menu options in the IMS Centre are programmed as “Windows Standard”. This means that “Open”, “Cut”, “Paste”, etc within the IMS Centre act in exactly the same way as they do in all other Windows programmes. The following explanations have been provided for the Dolphin specific functions and features:

8.4.1. File - Export

Selecting this gives the user the option of saving the document in the following different formats:

8.4.1.1. Cascading Style Sheets (CSS) format

Cascading Style Sheets (CSS) is a simple mechanism for adding style (e.g. fonts, colors, spacing) to Web documents. Once created in the IMS Centre, simply export the document to your web directory using this feature.

8.4.1.2. Portable Document Format (PDF) format.

Selecting this option allows the IMS Document to be saved in the universally accepted PDF format. Portable Document Format (PDF) is a unique type of cross platform file format developed by Adobe. It is Cross Platform, Navigational, Ultra-Printable, Ultra-Viewable and Smaller than other conventional document formats.

- Cross Platform: a cross-platform file format that represents documents independent of the software, hardware, and the operating system used to create the file. In simple words, you can read a PDF document in Windows that was created on a Macintosh that you downloaded from a Web site running Unix.

- Navigational: objects built into the PDF file format allow users and creators to expand the usefulness of a publication. Such items include: Internal and external links, bookmarks, thumbnails of each page, article threads, form fields, buttons for navigation, notes to annotate information, views to allow a user to magnify or reduce a page to fit within the user's computer screen.

- Ultra-Printable: PDF files are based on the PostScript language imaging model. This enables sharp, color-precise printing on almost all printers.

- Ultra-Viewable: On screen PDF files have a precise color match regardless of the monitor used. PDF files allow the user to magnify documents up to 800% without the loss of clarity in text or graphics.

- Smaller: PDF files can be optimized to reduce their file sizes. PDF files for example can be 1/5 of the size of their HTML counterparts.

8.4.2. File - Page Setup

Using this menu item is the same as using the Page Setup button.

8.4.3. File - Home

This is the same as using the Home button.

8.4.4. Edit - Hyperlink

If there is Hyperlinked text in a document, and if the insertion point is within the range of text encompassed by the hyperlink, this option is available from the Edit menu. Selecting it opens the Hyperlink dialogue box where you can edit the parameters of the hyperlink. (See Hyperlink)

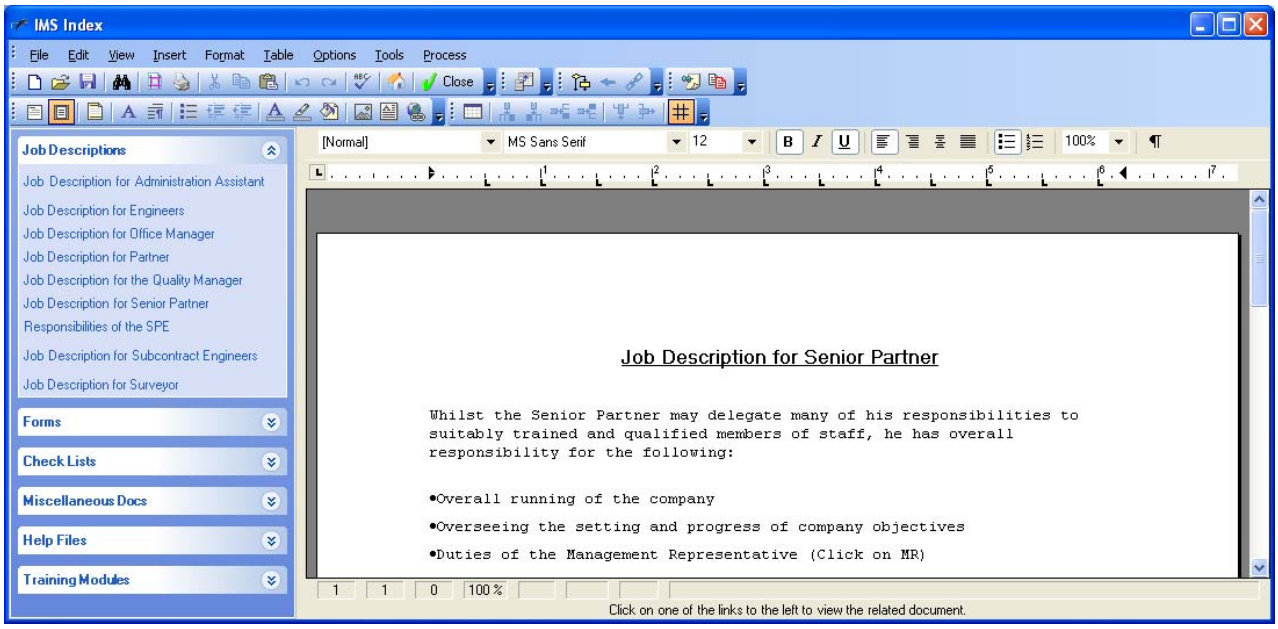
8.4.5. Edit - Targets

In a document that has “Targets” in it, positioning the insertion point at the target will allow this option to be selectable. Changing the Target Name and clicking on “OK” saves the new Target Name in the document. (Note that any Hyperlinks in other documents that aim at this Target will need to be reprogrammed to reflect the new Target Name. Alternatively, place an additional target alongside the original, so that both are available for Hyperlinks.)

8.5. Document Panel

The Document Panel is where the editing of the document takes place (by those with the correct authority to do so). The panel comprises the following areas:

- Formatting Button Bar
- Document Ruler Bar
- Document
- Status Bar


IMS Index
File Edit View Insert Format Table Options Tools Process
Close
Job Descriptions
Job Description for Administration Assistant
Job Description for Engineers
Job Description for Office Manager
Job Description for Partner
Job Description for the Quality Manager
Job Description for Senior Partner
Responsibilities of the SPE
Job Description for Subcontract Engineers
Job Description for Surveyor
Forms
Check Lists
Miscellaneous Docs
Help Files
Training Modules
[Normal]
MS Sans Serif
12
100%
Job Description for Senior Partner
Whilst the Senior Partner may delegate many of his responsibilities to suitably trained and qualified members of staff, he has overall responsibility for the following:
•Overall running of the company
•Overseeing the setting and progress of company objectives
•Duties of the Management Representative (Click on MR)
Click on one of the links to the left to view the related document.

8.5.1. Formatting Button Bar

The formatting Button Bar follows standard windows protocol.

The attributes selected (font face, font size, bold, italic and underline) are applied to any text that is highlighted.

Formatting selected (justification, bullet points and numbering) applies to the paragraph in which the insertion point is placed.

The zoom facility applies to the view of the document without affecting the actual document in any way.

Additionally, layout marks can be switched on and off by toggling the Paragraph Marks button.

8.5.2. Document Ruler Bar

8.5.2.1. Insert Tabs

The type of tab is selected before inserting into the ruler bar by repeatedly clicking on the Tab Marker Selector button. Initially, the selector shows a Left Tab. Clicking it repeatedly causes the type of tab to advance to Right Tab, Centre Tab, Decimal Tab and Far Right Tab.

Select the Tab Marker required and then click on the Ruler Bar to place the Tab Marker at that location. When selecting or positioning a Tab Marker, the position from the left hand edge of the page appears next to the Tab Marker Selector. Once inserted into a paragraph, the Tab will carry on to any other paragraphs created from that one.

Once inserted into a paragraph, pressing the Tab button on your keyboard causes the insertion point to move to the next Tab Marker and for the text inserted there to follow the format as defined by the type of Tab Marker selected, i.e. right justified, decimal aligned, etc.

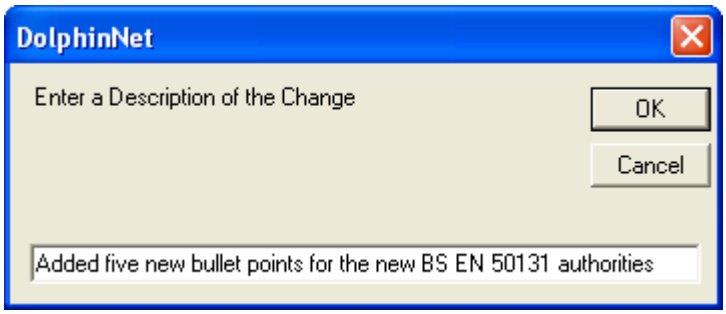
8.5.2.2. Delete Tabs

On the ruler bar, click on the Tab Marker on the Ruler Bar and drag it downward off of the Ruler Bar, then release the mouse button.

8.5.3. Document

The document appears in the main part of the panel, at the zoom specified and with the Paragraph Marks showing or not as specified on the Formatting Button Bar. The document is edited in this panel by inserting and deleting text and formatting it using the Formatting Button Bar.

Once the editing is completed, click on the Save button. This opens up a dialogue box where you can add a Description of the Change.



This description appears in the list of revisions under the Revision History. Click on “OK” to complete the save routine. The current document is attached to the new document and can be accessed via the Old Revision Attachments button. The new document is the only one available for normal use from the moment it is saved.

8.5.4. Status Bar

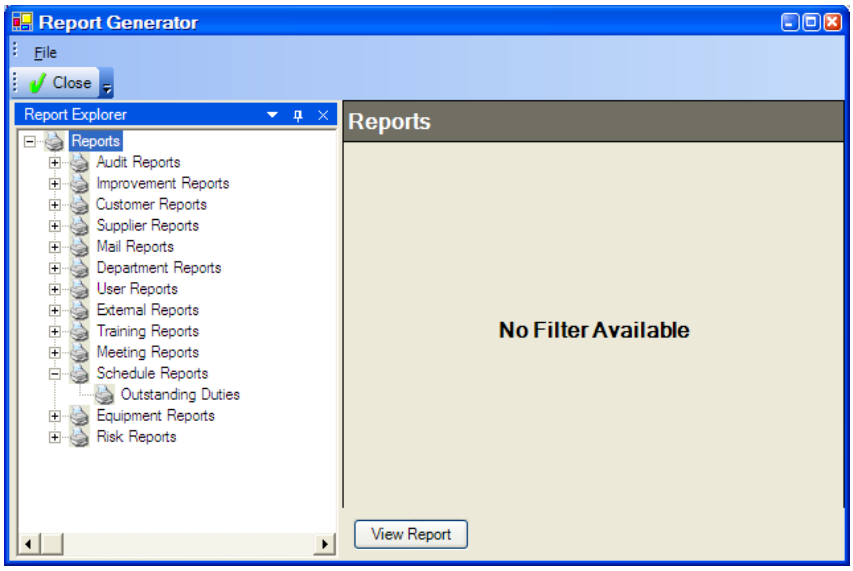
The Status Bar shows certain information about the document being shown.

Chapter 9. Report Centre

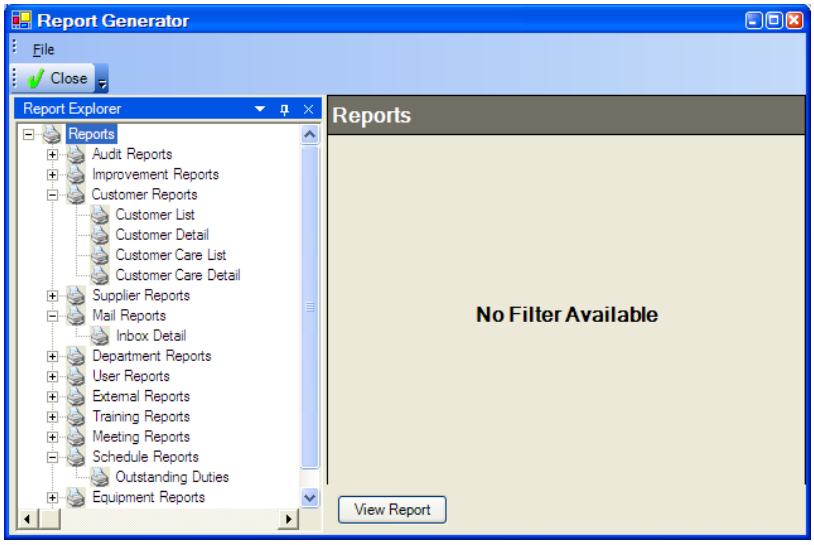
9.1. Introduction

The Report Centre is where the results of data analyses can be viewed and printed. The Report Centre is designed to produce powerful and up-to-the-minute reports on the current state of the management system. Better and timely information should be the basis for making informed and accurate decisions.

Entering the Report Centre opens the Report Generator.

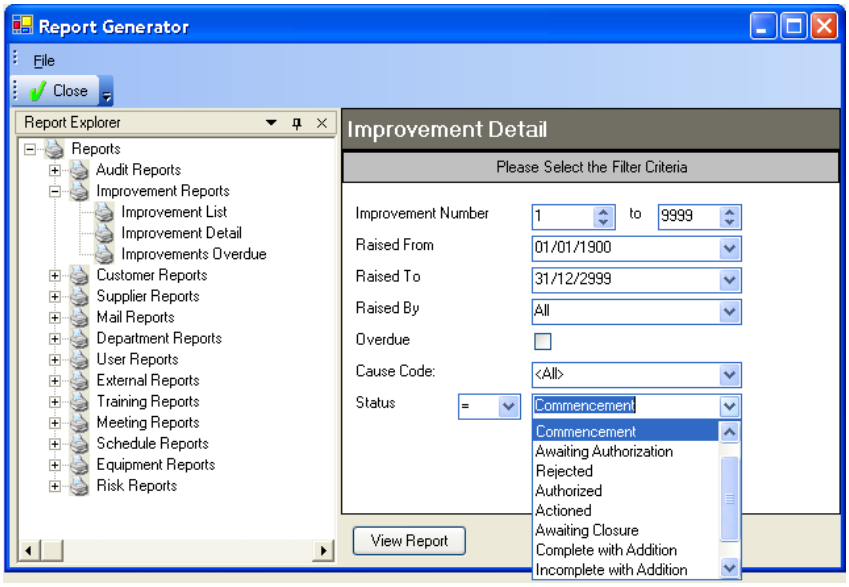


The Report Explorer in the left-hand panel is an expandable list of available reports. By clicking on the + symbol, the various options can be made available.



By selecting an item on the list in the Report Explorer, the possible options are made available in the right-hand panel. These options are then used to filter the results in the databases and to generate a report in a predefined format.

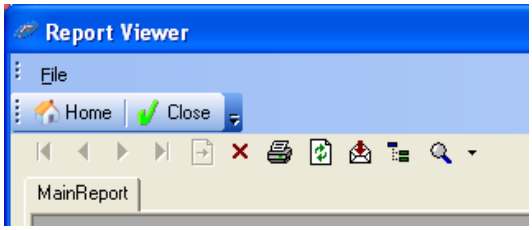
For example, it is possible to show complete or incomplete sections of the Action Improvement Detail Report.



In comparison some reports do not have filtering options and so the right-hand panel will continue to display the legend “No Filter Available”. This would be for reports that are based on a pre-defined and standard set of filters i.e. the “Improvements Overdue” report is always all Actions and Improvements that are past their “Action By” date that are still open as at the time of producing the report.

9.2. Report Viewer Button Bar

Once a report has been generated it will appear in a “Report Viewer” window. At the top of the window is a short menu bar and a small button bar.



The two options on the File Menu bar and on the Button Bar are:

9.2.1. Home

Pressing this button closes the Process Centre and returns the User to the Dolphin Main Page.

9.2.2. Close

Pressing this button closes the Process Centre and returns the User to the area that was open prior to opening the Process Centre.

9.2.3. Report Viewer Buttons

9.2.3.1. First

In multiple page reports, pressing this button takes you to the first page. In a single page report, this option is greyed out and cannot be selected.

9.2.3.2. Previous

In multiple page reports, pressing this button takes you to the page immediately previous to the page which you are on currently. In a single page report, this option is greyed out and cannot be selected.

9.2.3.3. Next

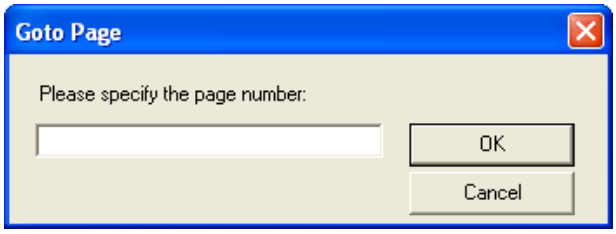
In multiple page reports, pressing this button takes you to the page immediately following the page which you are on currently. In a single page report, this option is grayed out and cannot be selected.

9.2.3.4. Last

In multiple page reports, pressing this button takes you to the last page. In a single page report, this option is greyed out and cannot be selected.

9.2.3.5. Go To Page

In multiple page reports, pressing this button opens a dialogue box that requests the page number that you want to go to.



Insert the page number and click on the “OK” button to go to that last page. In a single page report, this option is greyed out and cannot be selected.

9.2.3.6. Close Current View

This option is currently disabled in Dolphin as the Menu Bar and the Dolphin Button Bar provide this functionality.

9.2.3.7. Print Report

Clicking this button opens the Print Dialogue Box and the report can be printed in its entirety or by selecting the relevant pages using standard Windows print dialogue notations. The report can be printed to any system printer, even if a fax printer has been set up.

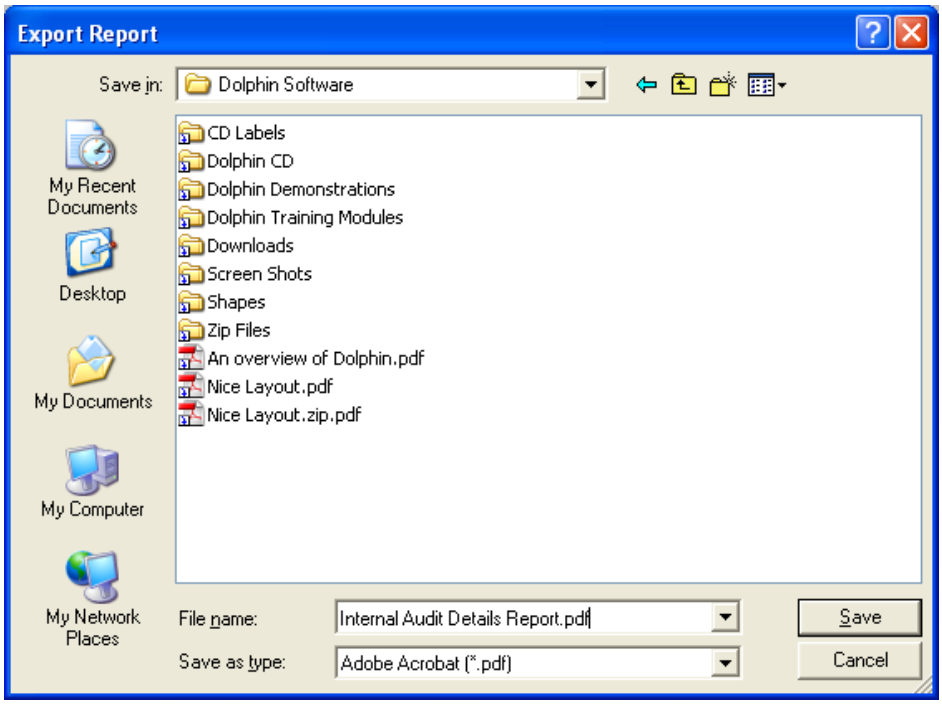
To send the report by email, it is recommended to use the “Export Report” option.

9.2.3.8. Refresh

If the data represented in the report is changed in the Data Centre after the report has been generated, pressing the “Refresh” button updates the Report with the new data.

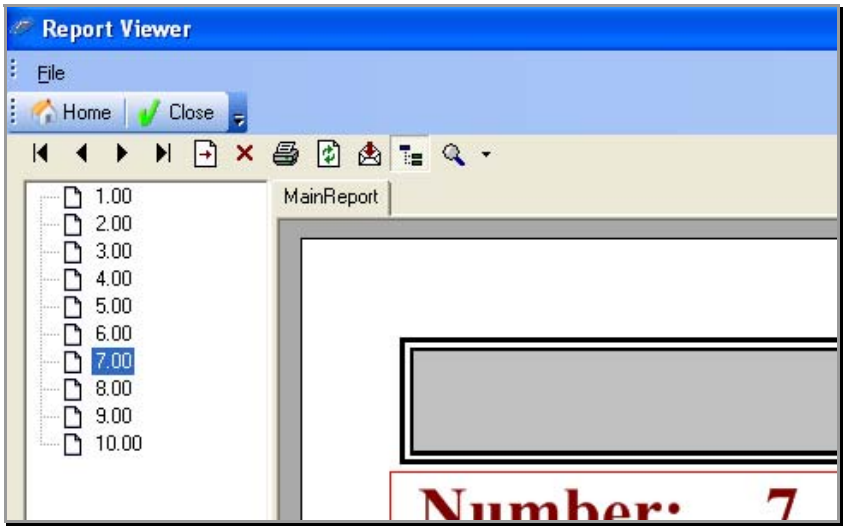
9.2.3.9. Export Report

Pressing this button creates a pdf version of the report and opens a dialogue box so that the User can select the name for the new pdf file and identify the location where it will be stored once created.



Pressing the “Save” button creates a pdf document with the stated name and saves it in the specified location. This file can then be imported into the IMS Centre, attached to Training Records, Audit Reports, etc. This format is also the approved format for sharing reports by attaching them to emails and posting them on Intranet or Internet sites.

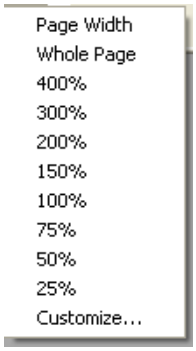
9.2.3.10. Toggle Group Tree



Pressing this button opens a side panel down the left-hand side of the main viewer window. All the individual records that make up the Report are listed in the left-hand panel. Clicking on one of the numbered icons takes you to that record within the Report.

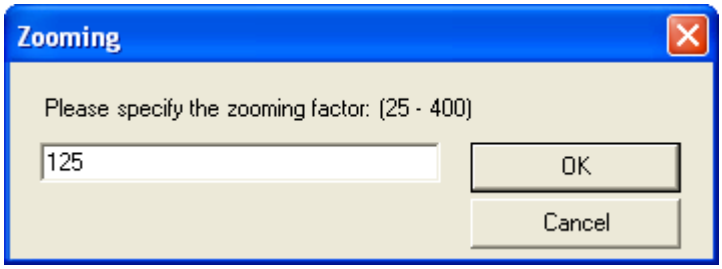
9.2.3.11. Zoom

Selecting the little black arrow next to the Zoom button reveals a drop-down menu of all of the pre-programmed zoom options. Selecting one of the options applies that zoom ratio to the Report Viewer window.



Customize…

Clicking on the "Customize…" option opens a dialogue box where the user can specify a zoom ratio to apply to the Report Viewer.

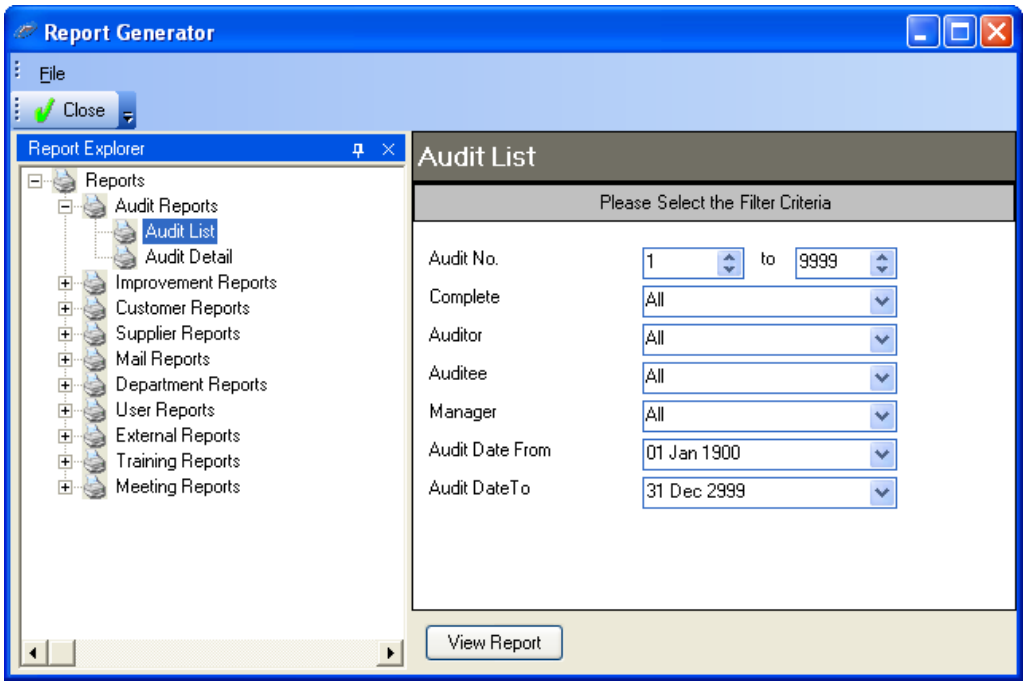


9.3. Available Reports

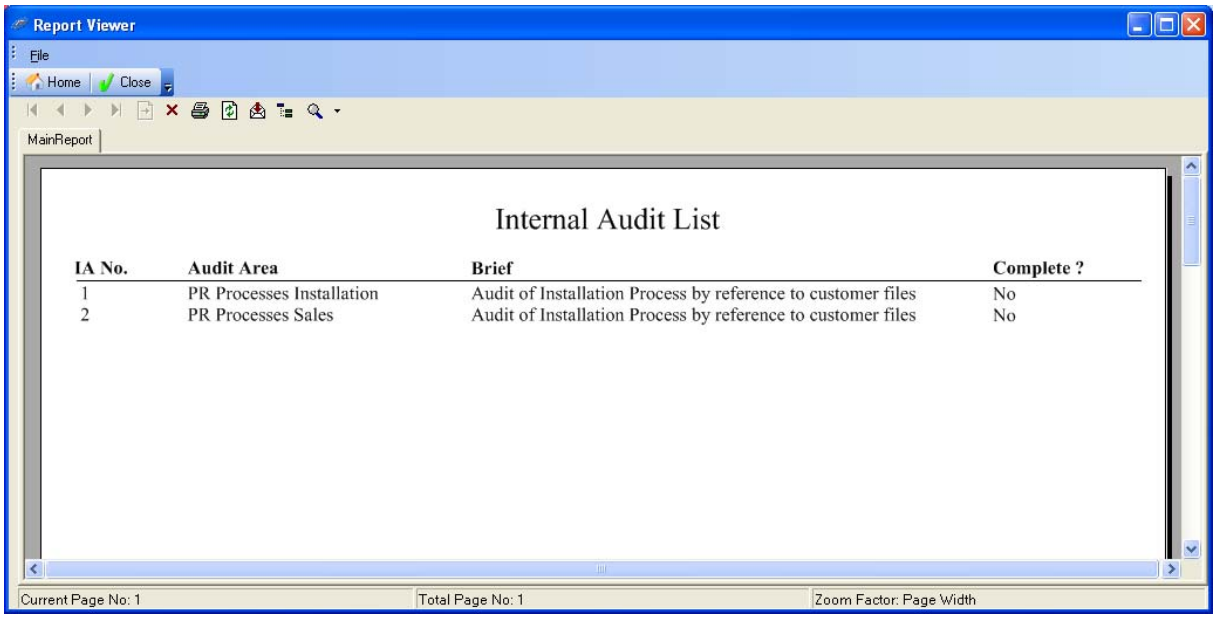
9.3.1. Audit Reports

9.3.1.1. Audit List

The List of Audits can be printed out based on the selection, or filtering, criteria set up in the right-hand panel.

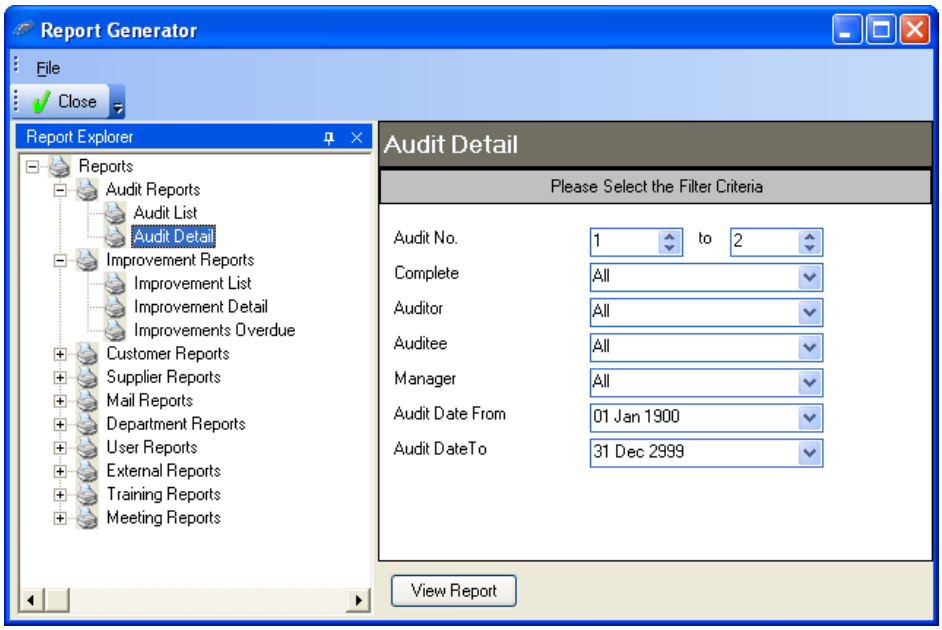


Once the relevant criteria are selected, clicking on the “View Report” button causes the Report to be generated on the screen.

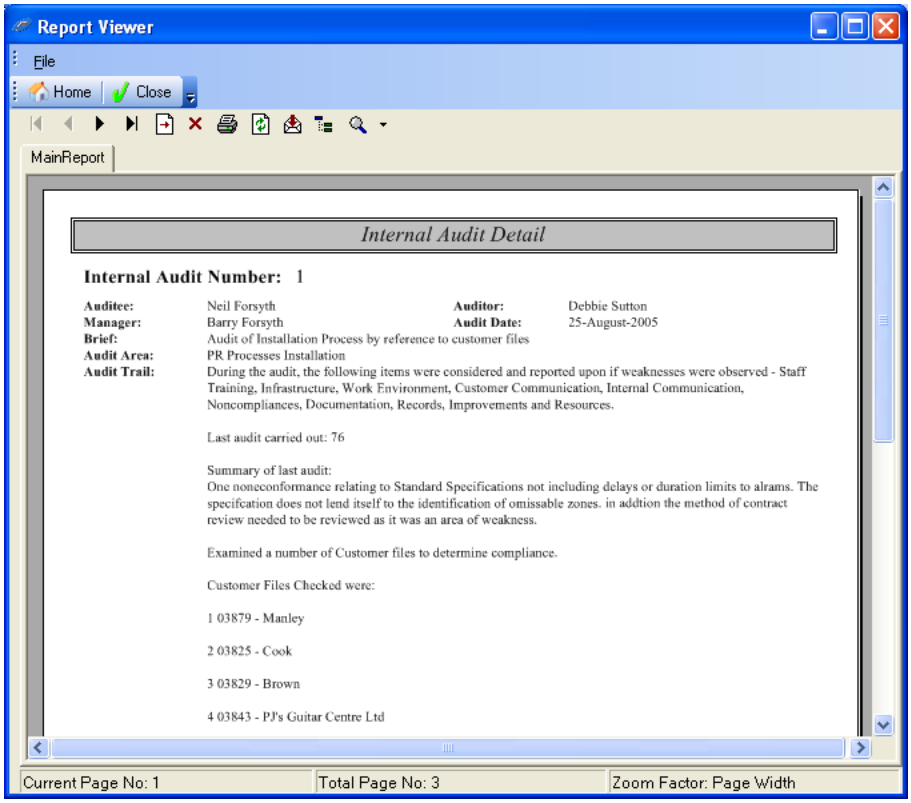


9.3.1.2. Audit Detail

The Detailed Audit Reports can be printed out based on the selection, or filtering, criteria set up in the right-hand panel.



Once the relevant criteria are selected, clicking on the “View Report” button causes the Report to be generated on the screen.

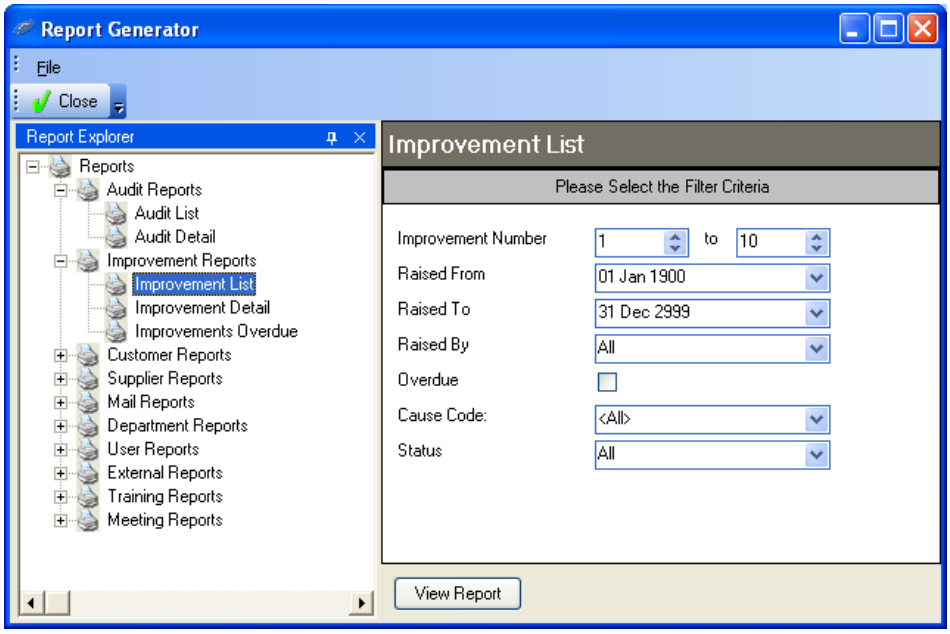

Report Viewer
File
Home
Close
MainReport
Internal Audit Detail
Internal Audit Number: 1
Auditee: Neil Forsyth
Auditor: Debbie Sutton
Manager: Barry Forsyth
Audit Date: 25-August-2005
Brief: Audit of Installation Process by reference to customer files
Audit Area: PR Processes Installation
Audit Trail: During the audit, the following items were considered and reported upon if weaknesses were observed - Staff Training, Infrastructure, Work Environment, Customer Communication, Internal Communication, Noncompliances, Documentation, Records, Improvements and Resources.
Last audit carried out: 76
Summary of last audit:
One nonconformance relating to Standard Specifications not including delays or duration limits to alrams. The specifcation does not lend itself to the identification of omissable zones. in addtion the method of contract review needed to be reviewed as it was an area of weakness.
Examined a number of Customer files to determine compliance.
Customer Files Checked were:
1 03879 - Manley
2 03825 - Cook
3 03829 - Brown
4 03843 - PJ's Guitar Centre Ltd
Current Page No: 1
Total Page No: 3
Zoom Factor: Page Width

This Audit Report is available from the Report Centre and also by clicking on the “Print” option in the specific Audit Record.

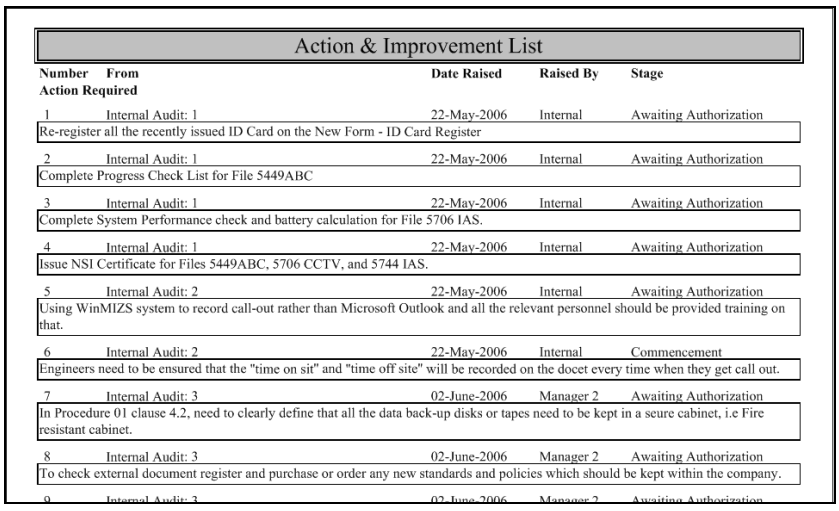
9.3.2. Improvement Reports

9.3.2.1. Improvement List

The List of Improvements can be printed out based on the selection, or filtering, criteria set up in the right-hand panel.



Once the relevant criteria are selected, clicking on the “View Report” button causes the Report to be generated on the screen.

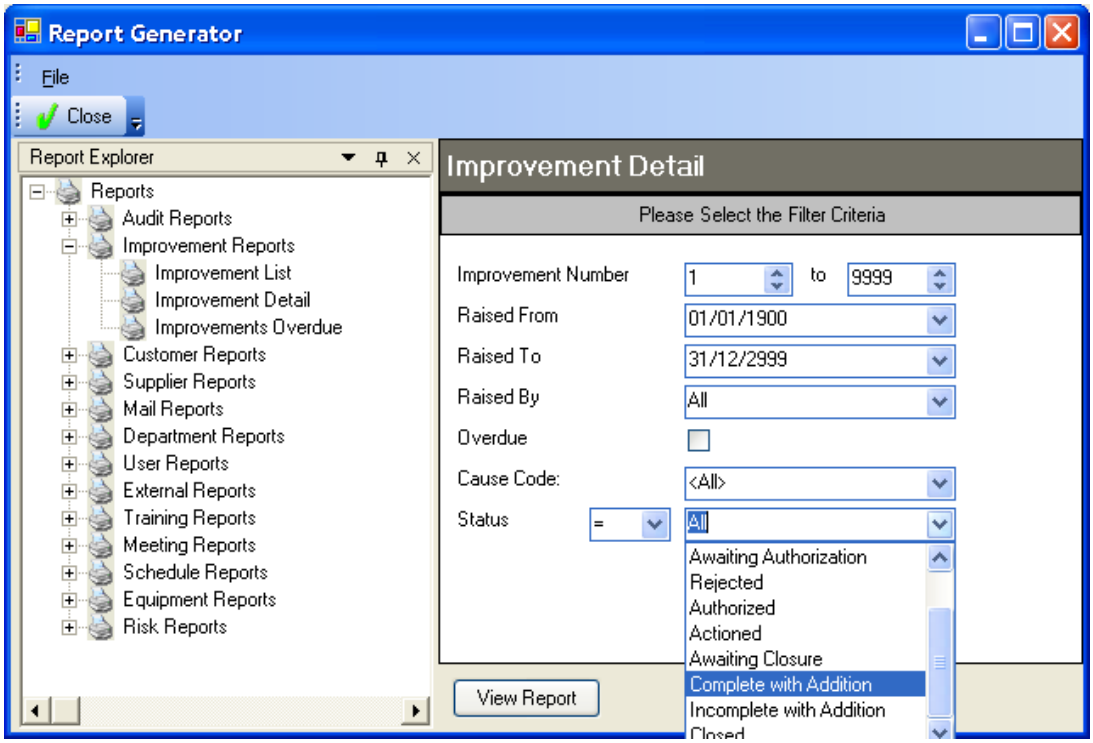


Action & Improvement List

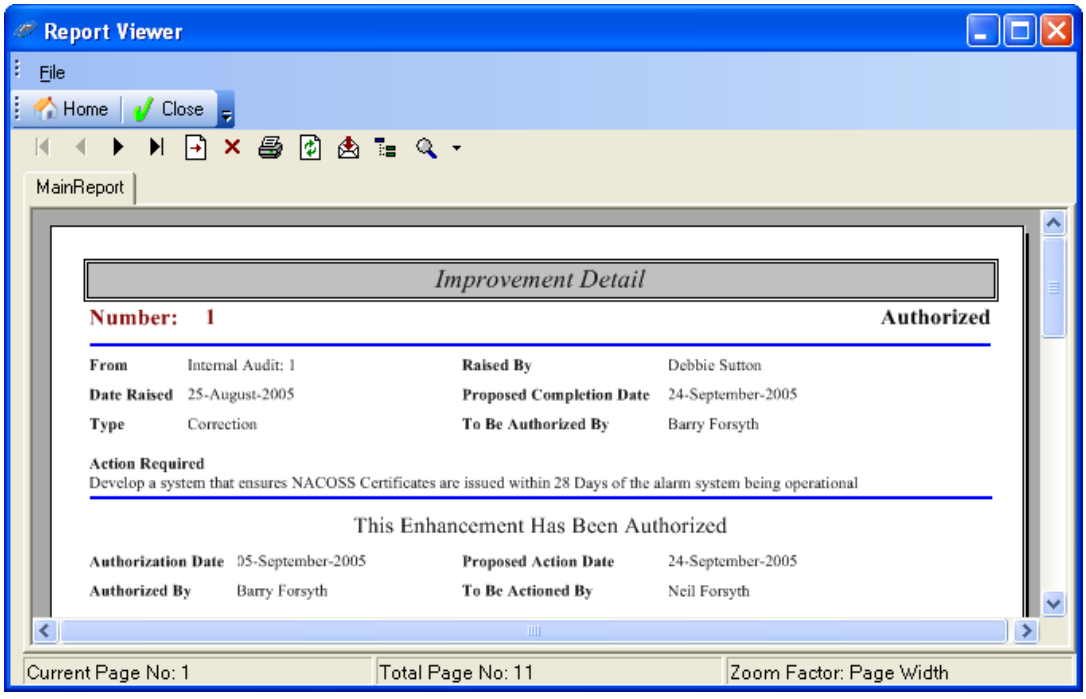
Number	From	Date Raised	Raised By	Stage
Action Required				
1	Internal Audit: 1	22-May-2006	Internal	Awaiting Authorization
Re-register all the recently issued ID Card on the New Form - ID Card Register				
2	Internal Audit: 1	22-May-2006	Internal	Awaiting Authorization
Complete Progress Check List for File 5449ABC				
3	Internal Audit: 1	22-May-2006	Internal	Awaiting Authorization
Complete System Performance check and battery calculation for File 5706 IAS.				
4	Internal Audit: 1	22-May-2006	Internal	Awaiting Authorization
Issue NSI Certificate for Files 5449ABC, 5706 CCTV, and 5744 IAS.				
5	Internal Audit: 2	22-May-2006	Internal	Awaiting Authorization
Using WinMIZS system to record call-out rather than Microsoft Outlook and all the relevant personnel should be provided training on that.				
6	Internal Audit: 2	22-May-2006	Internal	Commencement
Engineers need to be ensured that the "time on sit" and "time off site" will be recorded on the docet every time when they get call out.				
7	Internal Audit: 3	02-June-2006	Manager 2	Awaiting Authorization
In Procedure 01 clause 4.2, need to clearly define that all the data back-up disks or tapes need to be kept in a seure cabinet, i.e Fire resistant cabinet.				
8	Internal Audit: 3	02-June-2006	Manager 2	Awaiting Authorization
To check external document register and purchase or order any new standards and policies which should be kept within the company.				
9	Internal Audit: 3	02-June-2006	Manager 2	Awaiting Authorization

9.3.2.2. Improvement Detail

The Detailed Improvement Reports can be printed out based on the selection, or filtering, criteria set up in the right-hand panel.



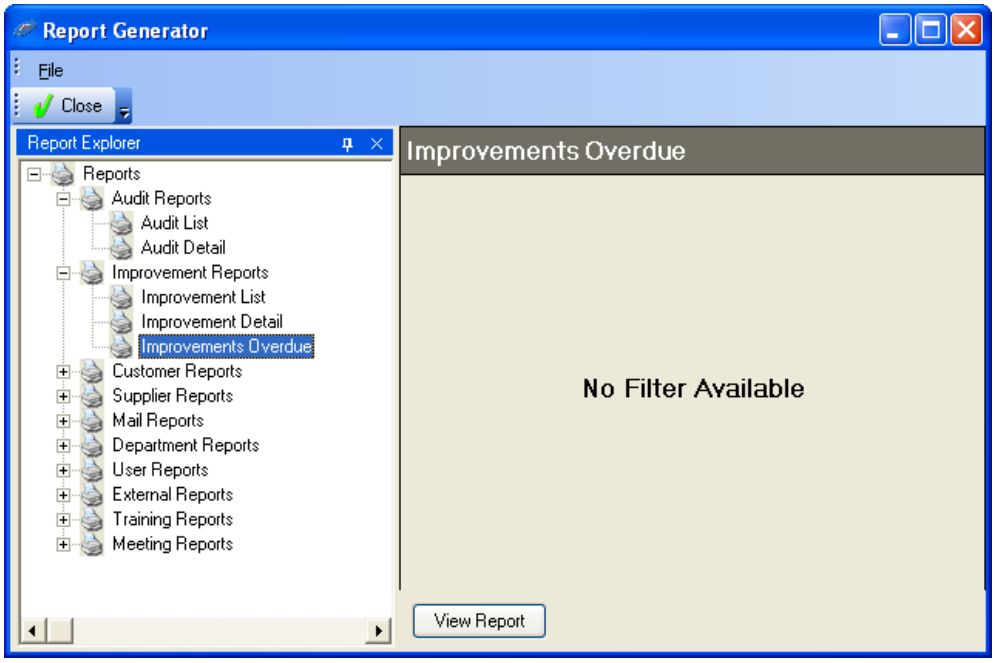
Once the relevant criteria are selected, clicking on the "View Report" button causes the Report to be generated on the screen.



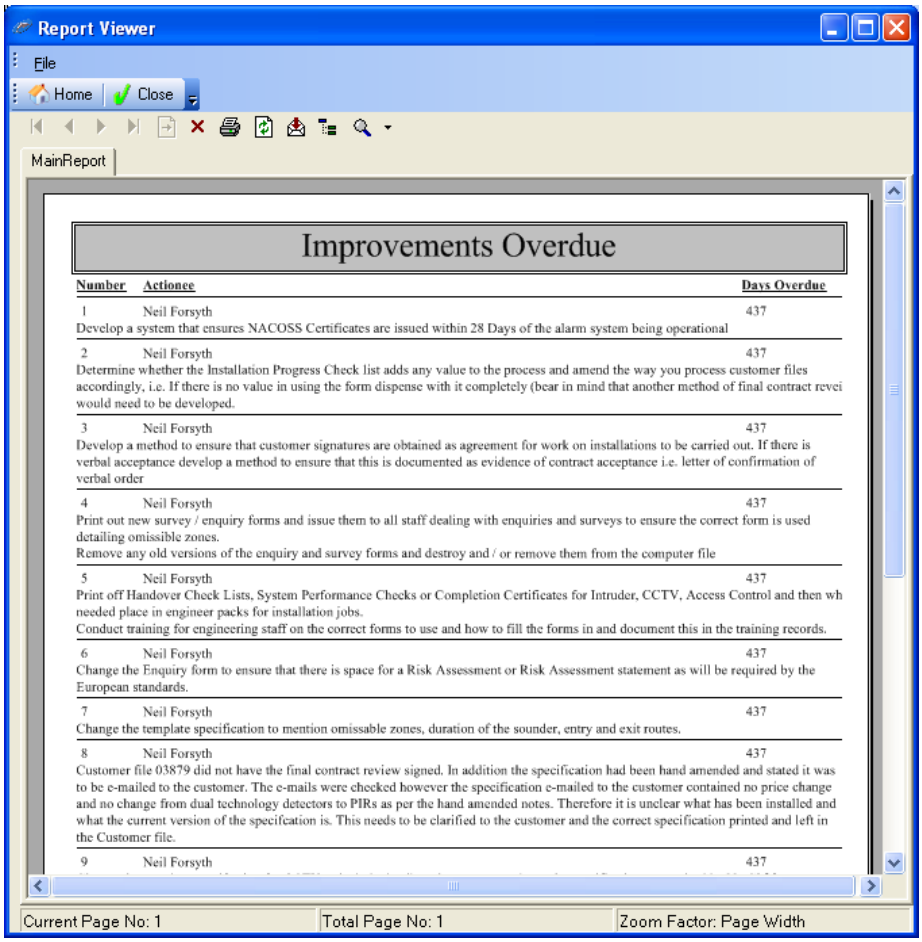
This Improvement Report is available from the Report Centre and also by clicking on the "Print" option in the specific "Action" or "Improvement".

9.3.2.3. Improvements Overdue

The Improvements Overdue Reports has no filtering options to select in the right-hand panel.



Clicking on the “View Report” button causes the Report to be generated on the screen.


Report Viewer
File
Home
Close
MainReport
Improvements Overdue
Number
Actionee
Days Overdue
1 Neil Forsyth 437
Develop a system that ensures NACOSS Certificates are issued within 28 Days of the alarm system being operational
2 Neil Forsyth 437
Determine whether the Installation Progress Check list adds any value to the process and amend the way you process customer files accordingly, i.e. If there is no value in using the form dispense with it completely (bear in mind that another method of final contract revei would need to be developed.
3 Neil Forsyth 437
Develop a method to ensure that customer signatures are obtained as agreement for work on installations to be carried out. If there is verbal acceptance develop a method to ensure that this is documented as evidence of contract acceptance i.e. letter of confirmation of verbal order
4 Neil Forsyth 437
Print out new survey / enquiry forms and issue them to all staff dealing with enquiries and surveys to ensure the correct form is used detailing omissible zones.
Remove any old versions of the enquiry and survey forms and destroy and / or remove them from the computer file
5 Neil Forsyth 437
Print off Handover Check Lists, System Performance Checks or Completion Certificates for Intruder, CCTV, Access Control and then wh needed place in engineer packs for installation jobs.
Conduct training for engineering staff on the correct forms to use and how to fill the forms in and document this in the training records.
6 Neil Forsyth 437
Change the Enquiry form to ensure that there is space for a Risk Assessment or Risk Assessment statement as will be required by the European standards.
7 Neil Forsyth 437
Change the template specification to mention omissable zones, duration of the sounder, entry and exit routes.
8 Neil Forsyth 437
Customer file 03879 did not have the final contract review signed. In addition the specification had been hand amended and stated it was to be e-mailed to the customer. The e-mails were checked however the specification e-mailed to the customer contained no price change and no change from dual technology detectors to PIRs as per the hand amended notes. Therefore it is unclear what has been installed and what the current version of the specifcation is. This needs to be clarified to the customer and the correct specification printed and left in the Customer file.
9 Neil Forsyth 437
Current Page No: 1
Total Page No: 1
Zoom Factor: Page Width

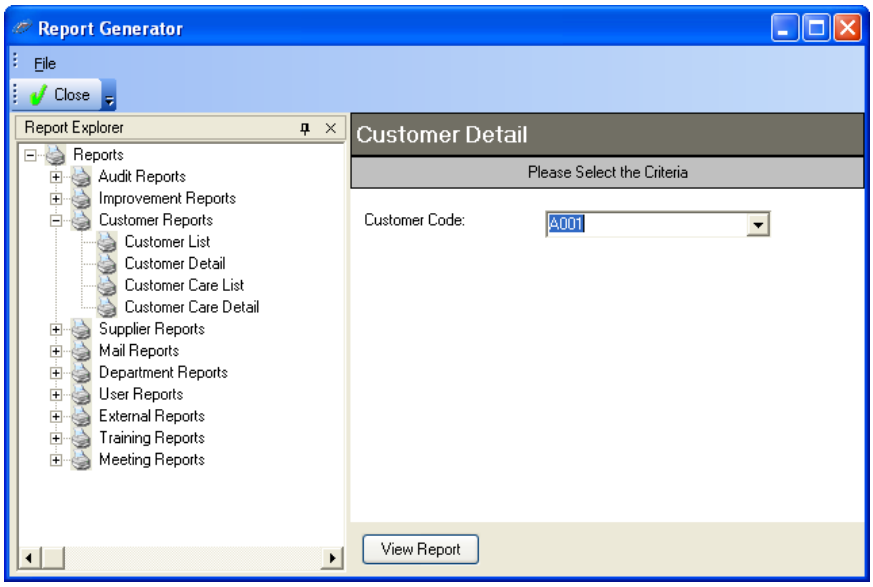
9.3.3. Customer Reports

9.3.3.1. Customer List

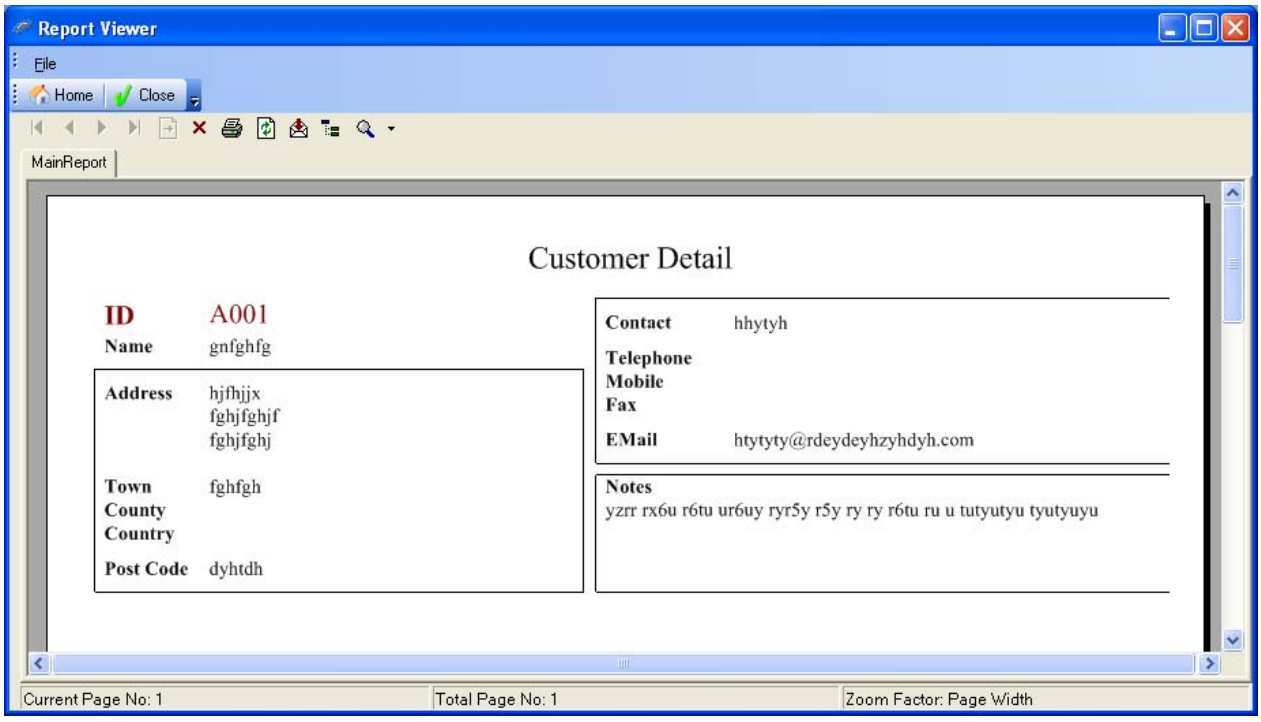
The Customer List Report has no filtering options to select in the right-hand panel. Clicking on the "View Report" button causes the Customer List Report to be generated on the screen.

9.3.3.2. Customer Detail

The Customer Detail Reports can be printed out based on the selection, or filtering, criteria set up in the right-hand panel.

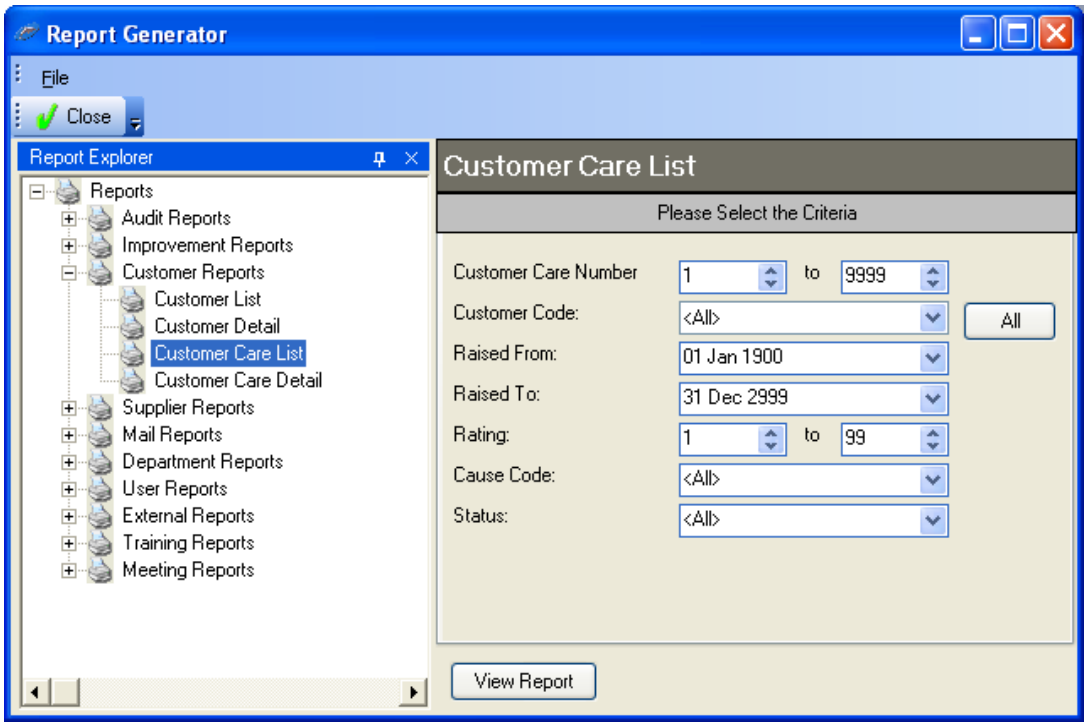


Select the Customer from the drop-down list and click on the "View Report" button. This causes the Customer Detail Report to be generated on the screen.

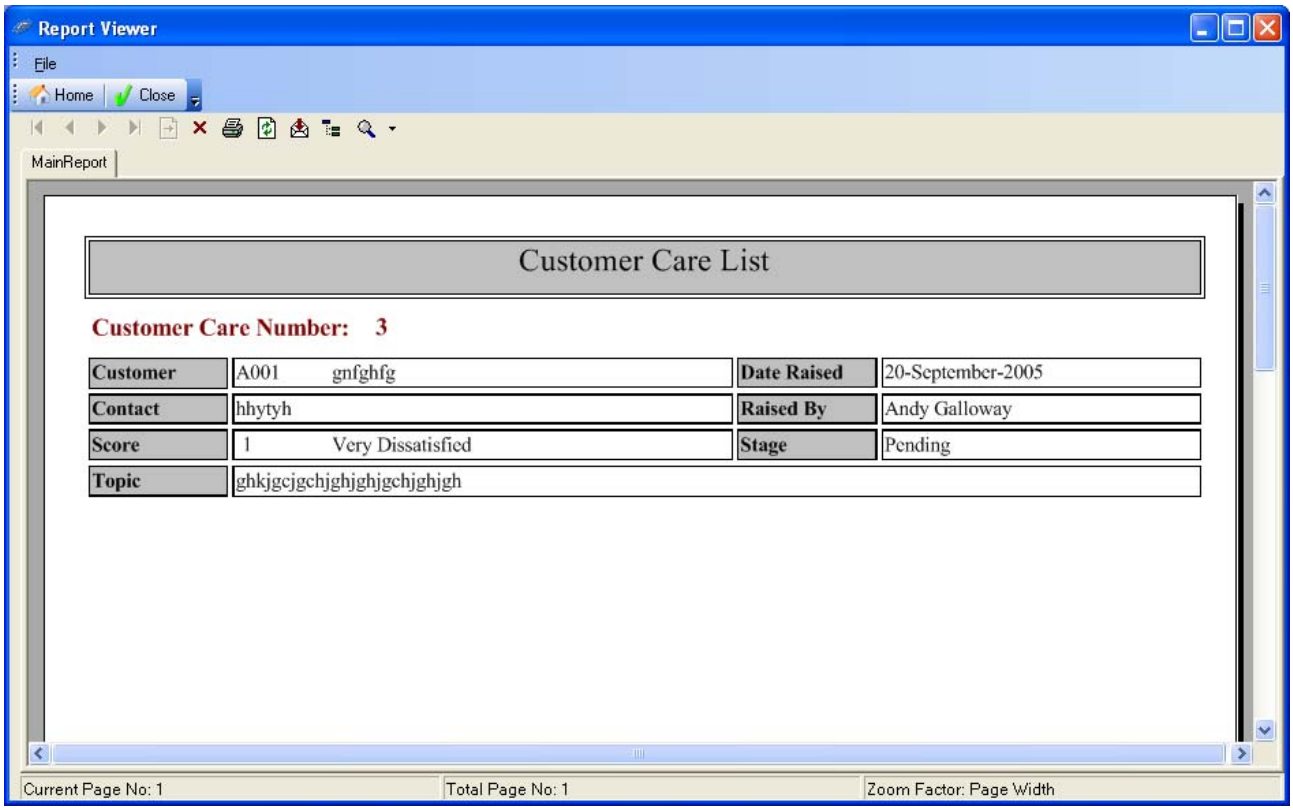


9.3.3.3. Customer Care List

The Customer Care Reports can be printed out based on the selection, or filtering, criteria set up in the right-hand panel. This can include Cause Codes and severity ratings.



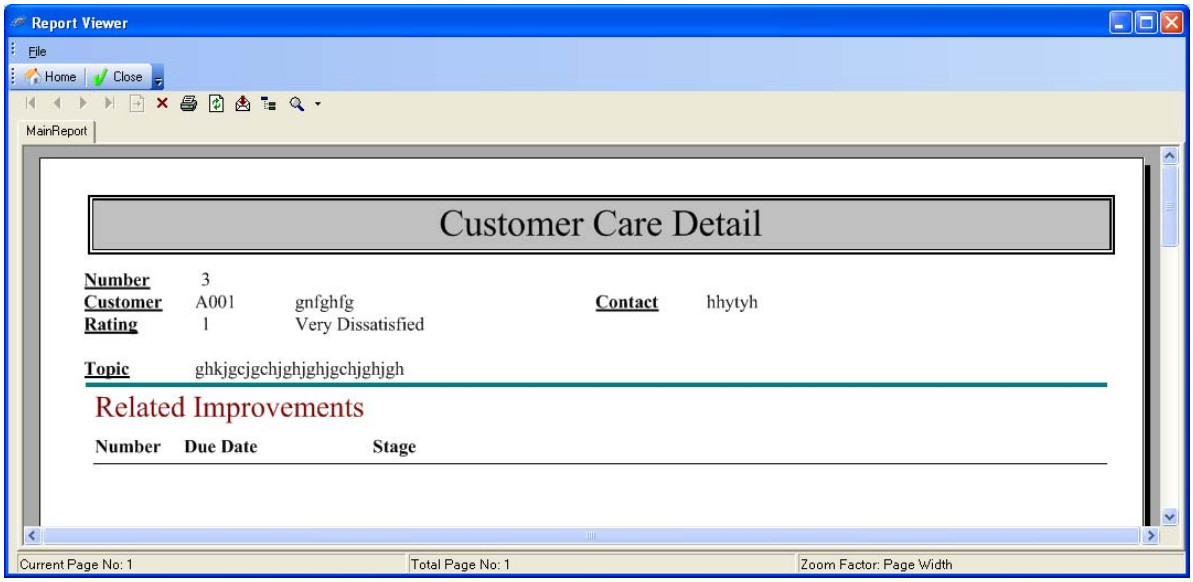
Clicking on the "View Report" button causes the Report to be generated on the screen.



This Report can then be printed or exported as detailed above.

9.3.3.4. Customer Care Detail

The filters for the Customer Care Detail Reports are the same as the Customer Care List. Clicking on the “View Report” button causes the Report to be generated on the screen.



This Report can then be printed or exported as detailed above.

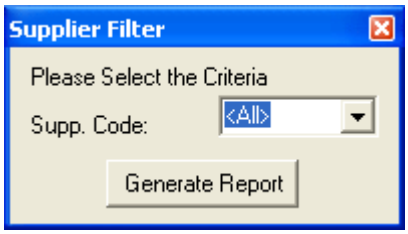
9.3.4. Supplier Reports

9.3.4.1. Supplier List

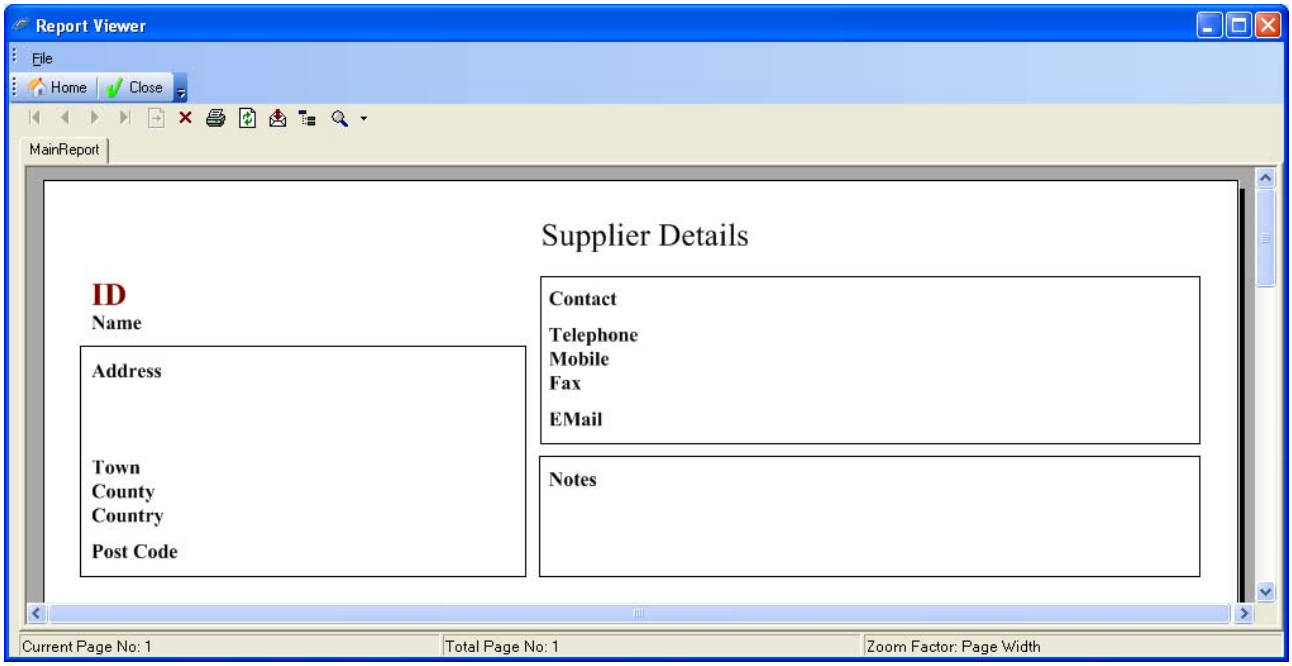
The Supplier List Report has no filtering options to select in the right-hand panel. Clicking on the “View Report” button causes the Supplier List Report to be generated on the screen.

9.3.4.2. Supplier Detail

The Supplier List Report has no filtering options to select in the right-hand panel. Clicking on the “View Report” button opens a Supplier Filter dialogue box. Select the supplier from the drop-down list.



Clicking on the “Generate Report” button causes the Supplier Detail Report to be generated on the screen.

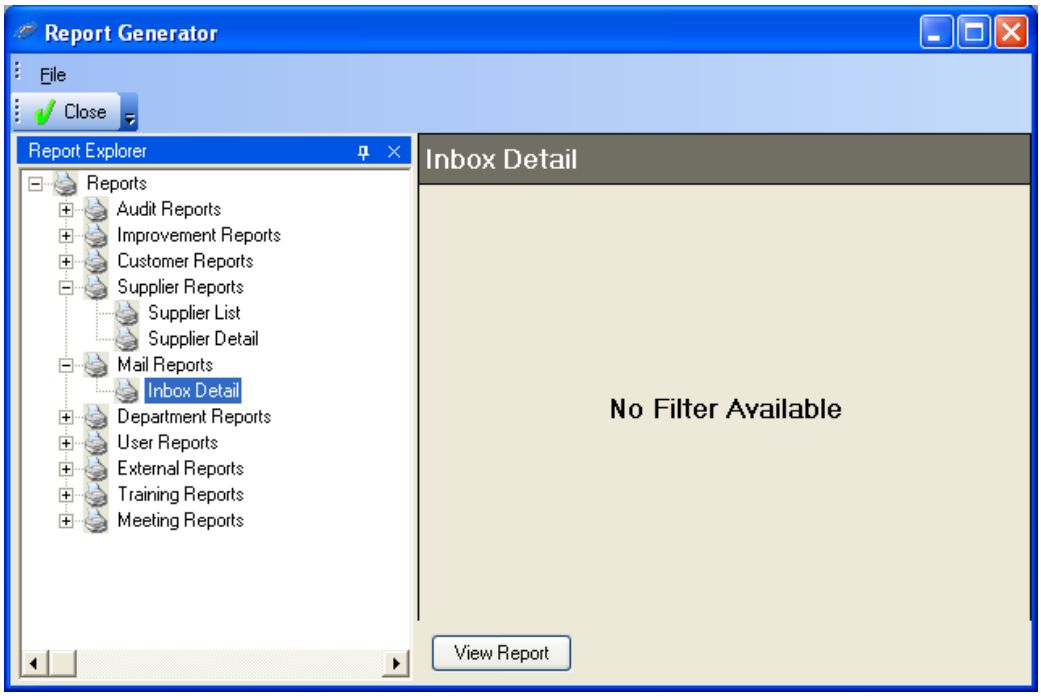


This Report can then be printed or exported as detailed above.

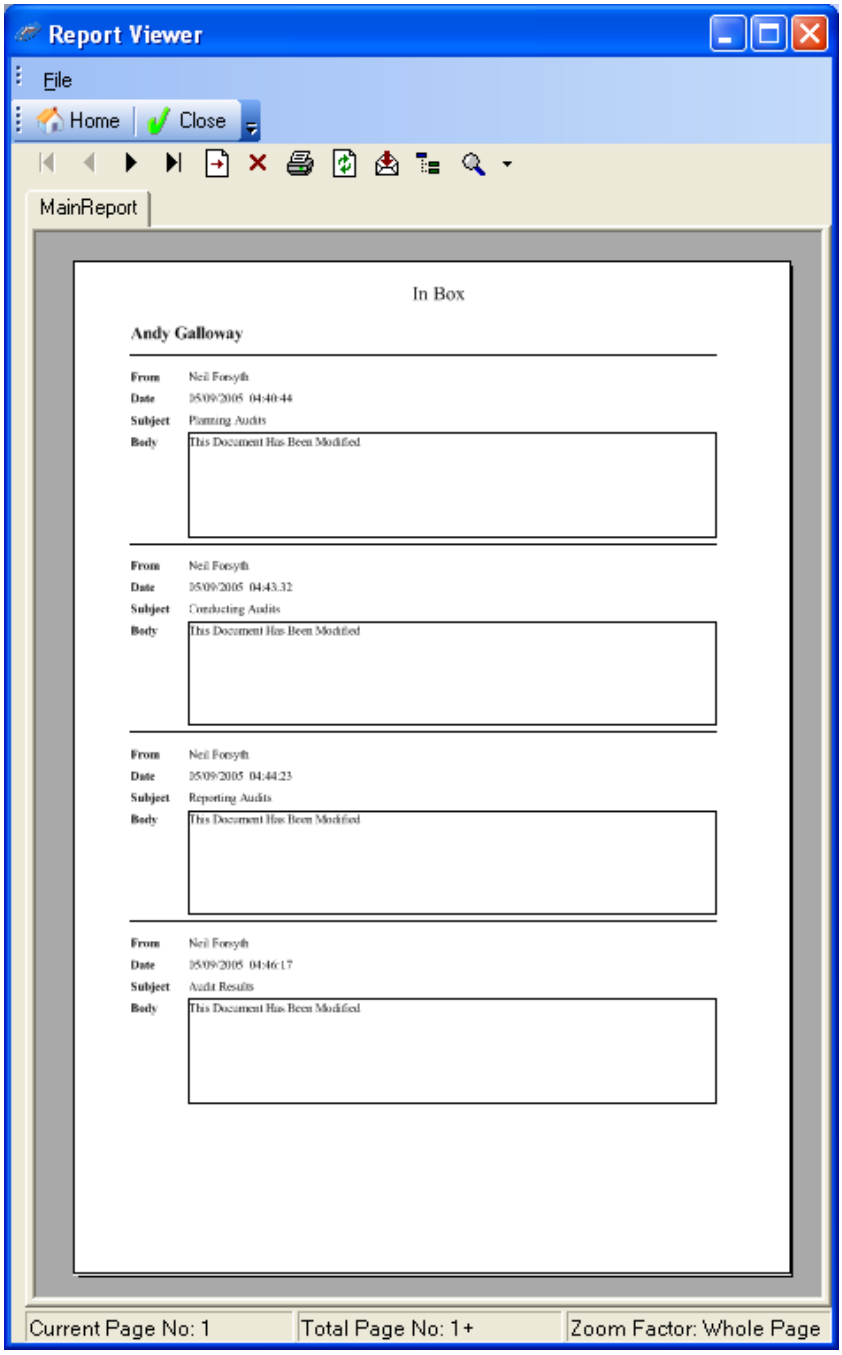
9.3.5. Mail Reports

9.3.5.1. Inbox Detail

The Inbox Detail Report has no filtering options to select in the right-hand panel.



Clicking on the “View Report” button causes the Inbox Detail Report to be generated on the screen.

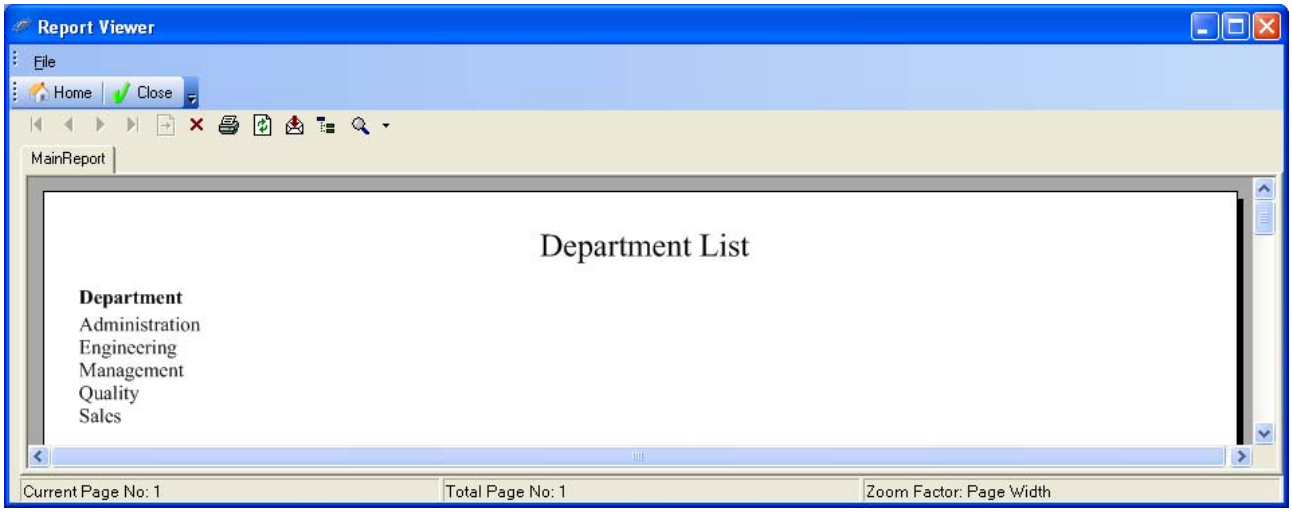


This Report can then be printed or exported as detailed above.

9.3.6. Department Reports

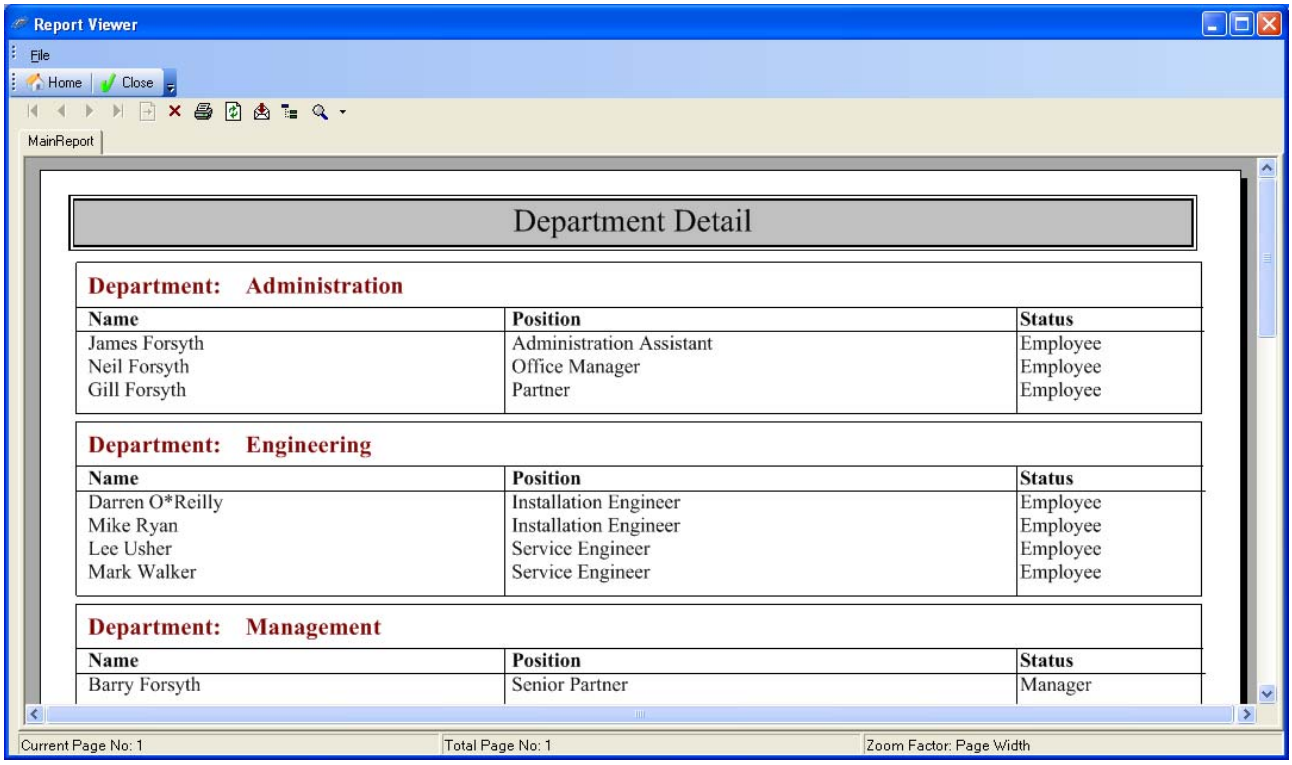
9.3.6.1. Department List

The Department List Report has no filtering options to select in the right-hand panel. Clicking on the “View Report” button causes the Department List Report to be generated on the screen.



9.3.6.2. Department Detail

The Department Detail Report has no filtering options to select in the right-hand panel. Clicking on the “View Report” button causes the Department Detail Report to be generated on the screen.

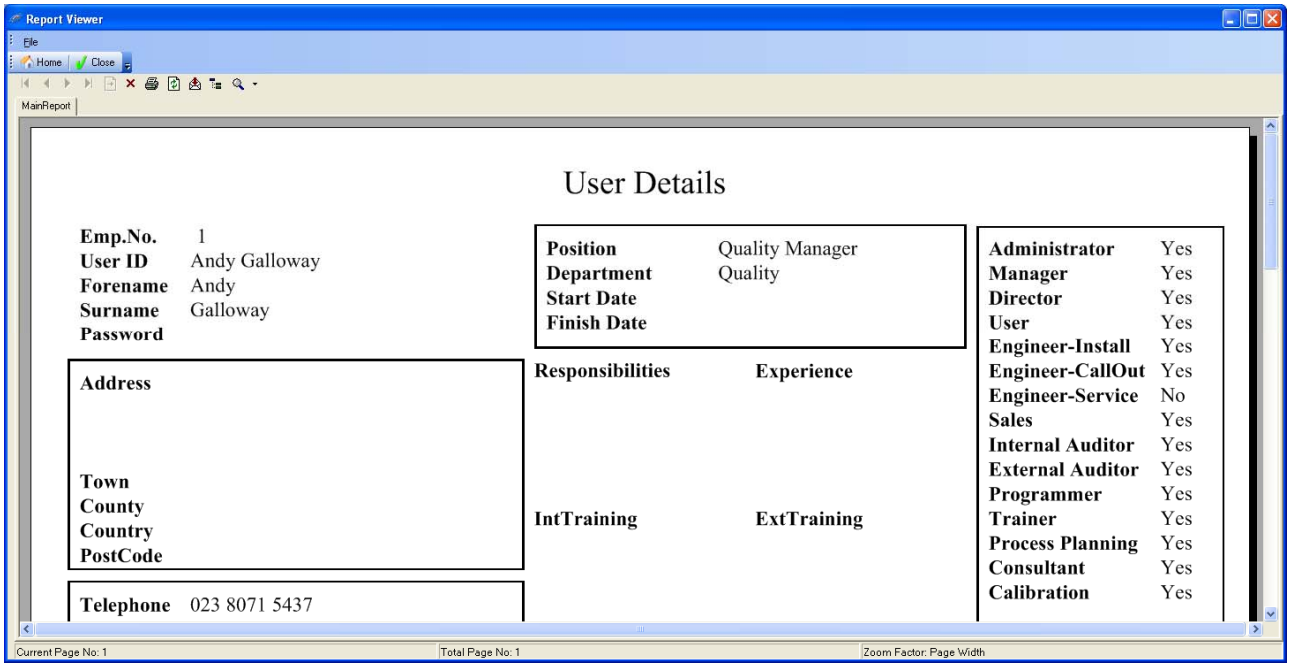


This Report can then be printed or exported as detailed above.

9.3.7. User Reports

9.3.7.1. User Detail - Current

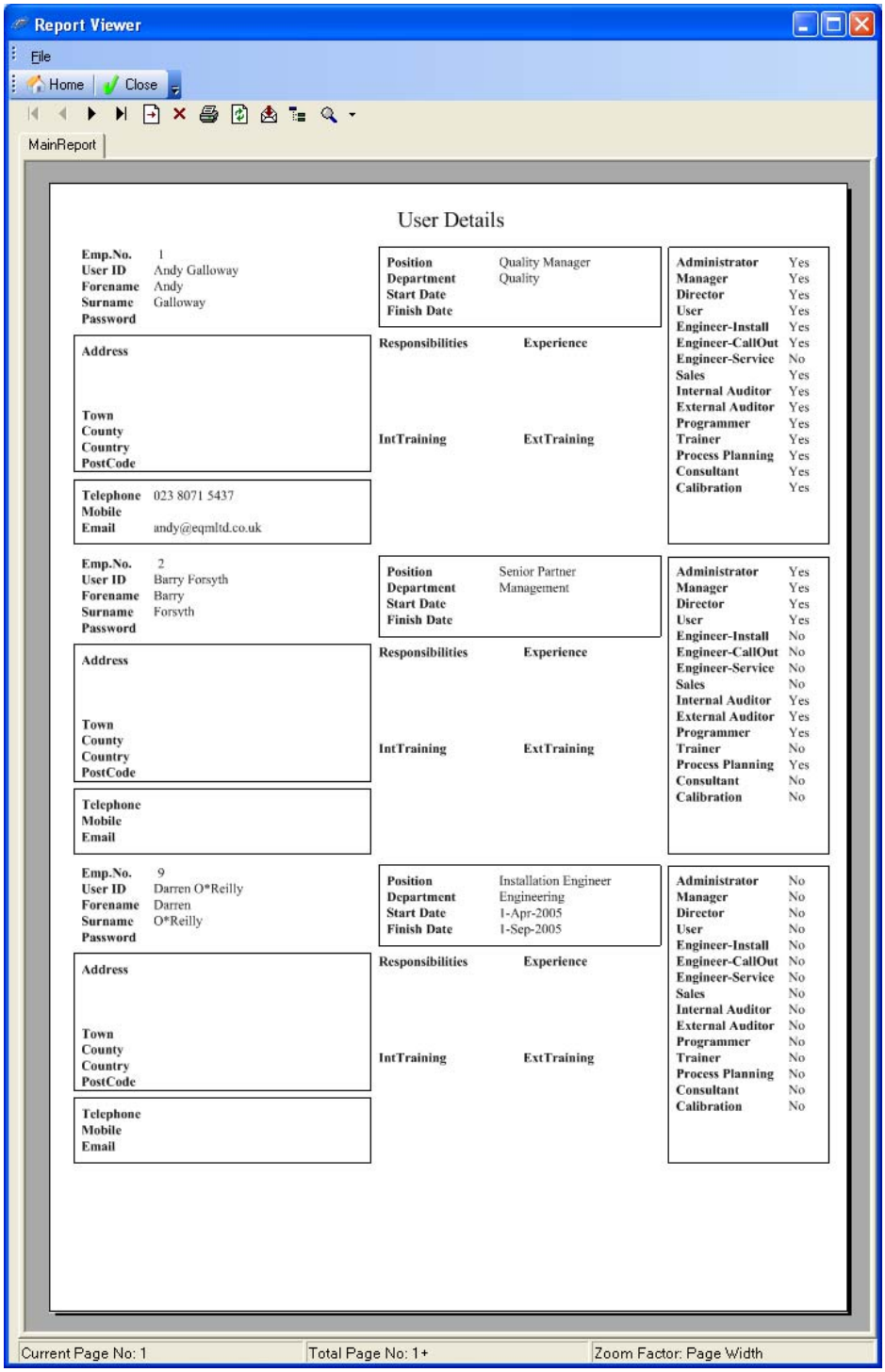
The User Detail - Current Report has no filtering options to select in the right-hand panel. It will always show the details of the User that is currently logged in to Dolphin. Clicking on the “View Report” button causes the User Detail - Current Report to be generated on the screen.



This Report can then be printed or exported as detailed above.

9.3.7.2. User Detail - All (Admin Only)

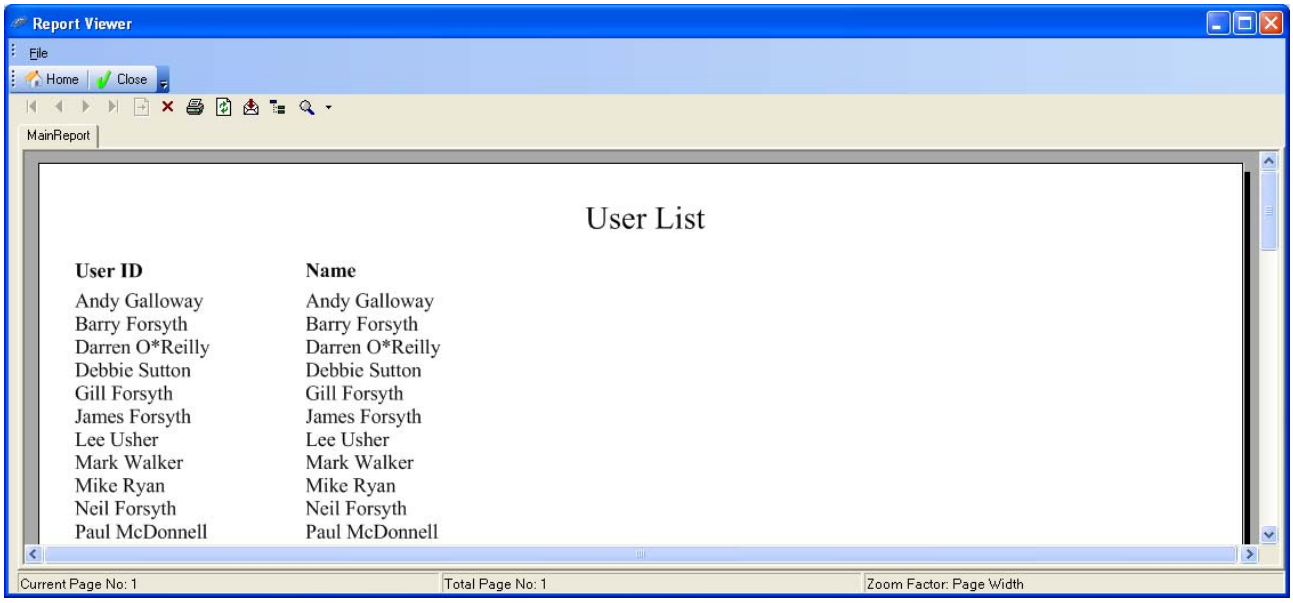
The User Detail - All Report has no filtering options to select in the right-hand panel. Administrators can access a report showing all of the details of all Users currently registered within Dolphin. Clicking on the “View Report” button causes the User Detail - All Report to be generated on the screen.



This Report can then be printed or exported as detailed above.

9.3.7.3. User List (Admin Only)

The User List Report has no filtering options to select in the right-hand panel. Administrators can access a report showing a list of all Users currently registered within Dolphin. Clicking on the "View Report" button causes the User List Report to be generated on the screen.



This Report can then be printed or exported as detailed above.

9.3.8. External Reports

9.3.8.1. View External Report

Selecting this report allows the Administrator to navigate to and review reports, e.g. Crystal Reports, produced external to Dolphin.

9.3.9. Training Reports

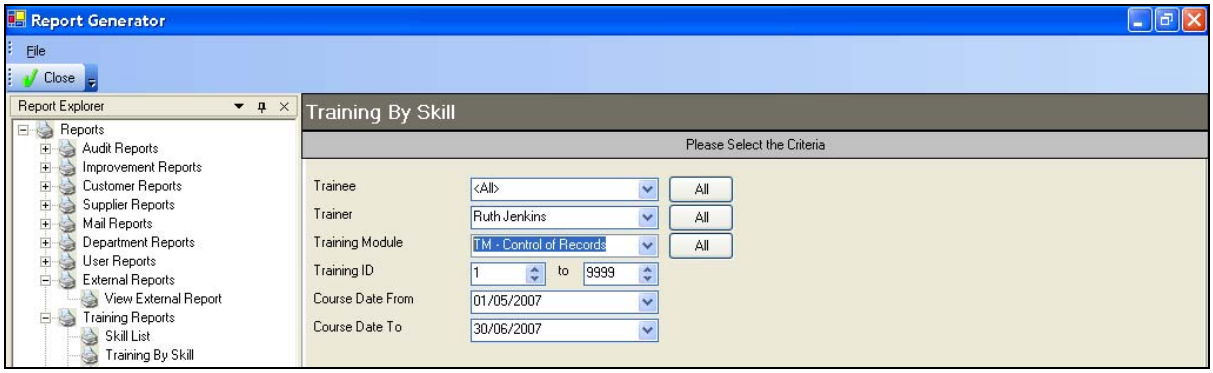
9.3.9.1. Skill List

The Skills List does not have any filtering criteria in the right hand panel. Selecting the Skills list will provide a list of all training modules currently registered within Dolphin. Clicking on the "View Report" button causes the Skills List Report to be generated on the screen as shown below.

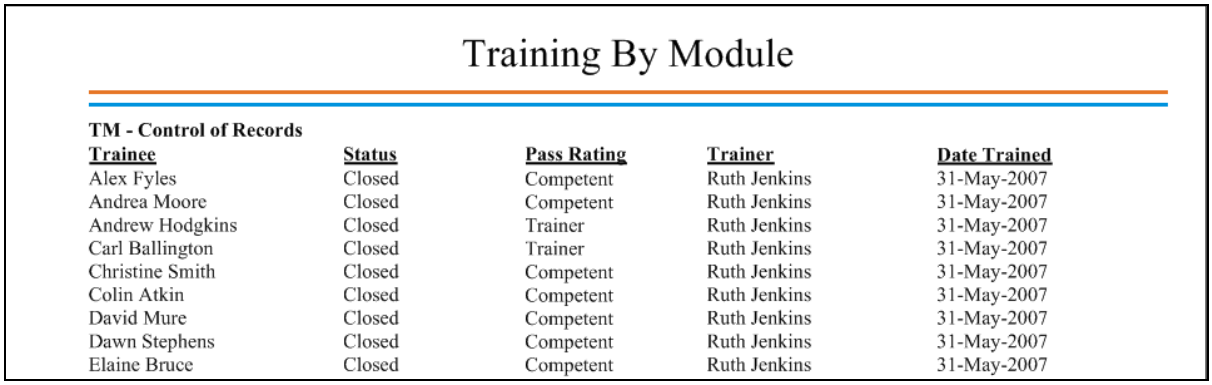
This Report can then be printed or exported as detailed above.

9.3.9.2. Training by Skill

The “Training by Skill” report allows an Administrator to use the filtering options in the right panel to produce a report of personnel registered within Dolphin and the Skills in which they have been trained. It is possible to upload a report of all personnel and all skills (e.g. training modules) or to narrow the search criteria and prepare a report of a particular skill type and all personnel or indeed one member of staff and all skills.



Clicking on the “View Report” button causes the Training by Skills Report to be generated on the screen as shown below.



Training By Module

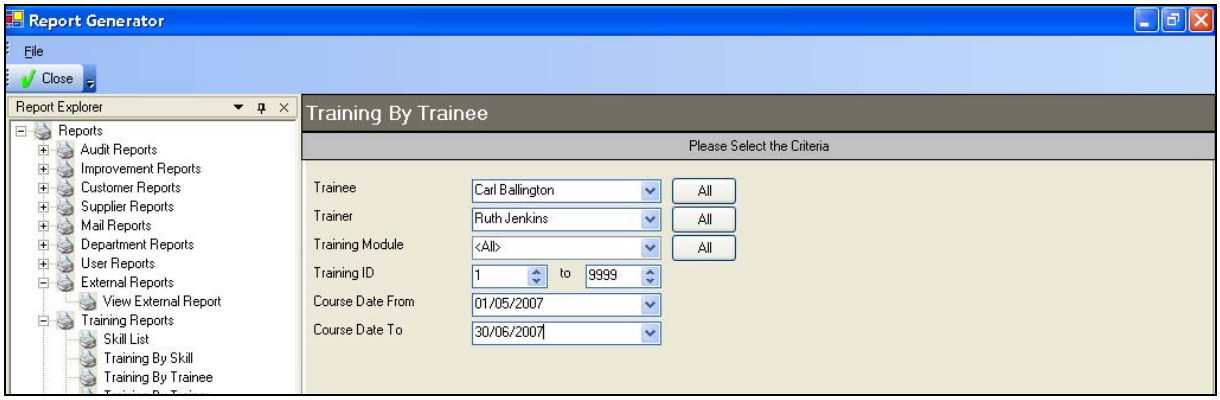
TM - Control of Records

Trainee	Status	Pass Rating	Trainer	Date Trained
Alex Fyles	Closed	Competent	Ruth Jenkins	31-May-2007
Andrea Moore	Closed	Competent	Ruth Jenkins	31-May-2007
Andrew Hodgkins	Closed	Trainer	Ruth Jenkins	31-May-2007
Carl Ballington	Closed	Trainer	Ruth Jenkins	31-May-2007
Christine Smith	Closed	Competent	Ruth Jenkins	31-May-2007
Colin Atkin	Closed	Competent	Ruth Jenkins	31-May-2007
David Mure	Closed	Competent	Ruth Jenkins	31-May-2007
Dawn Stephens	Closed	Competent	Ruth Jenkins	31-May-2007
Elaine Bruce	Closed	Competent	Ruth Jenkins	31-May-2007

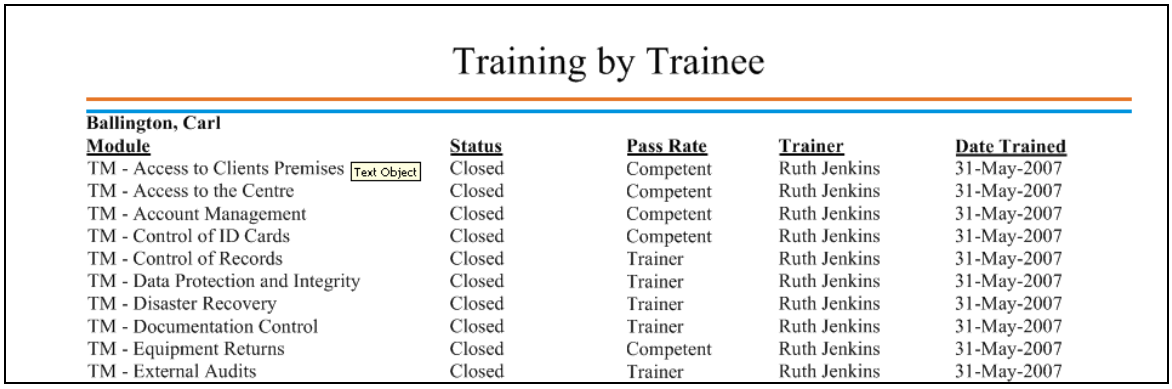
This Report can then be printed or exported as detailed above. Such a report is useful when evaluating staff training plans or future business direction.

9.3.9.3. Training by Trainee

The “Training by Trainee” report allows an Administrator to use the filtering options in the right panel to produce a report showing all trainees and the training modules assigned to their job title. Alternatively, the search criteria may be narrowed and a report of one individual and their training modules may be prepared.



Clicking on the “View Report” button causes the Training by Trainee Report to be generated on the screen as shown below.



Training by Trainee

Ballington, Carl

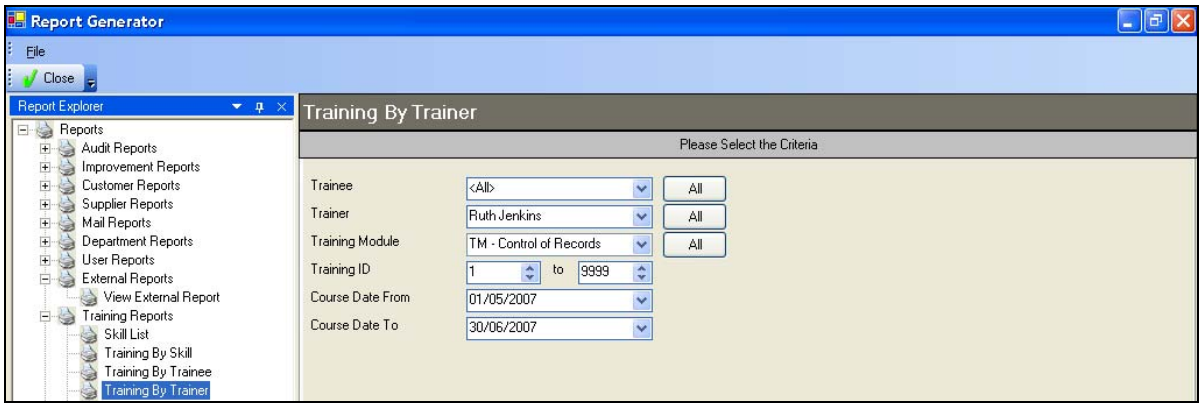
Module	Status	Pass Rate	Trainer	Date Trained
TM - Access to Clients Premises	Closed	Competent	Ruth Jenkins	31-May-2007
TM - Access to the Centre	Closed	Competent	Ruth Jenkins	31-May-2007
TM - Account Management	Closed	Competent	Ruth Jenkins	31-May-2007
TM - Control of ID Cards	Closed	Competent	Ruth Jenkins	31-May-2007
TM - Control of Records	Closed	Trainer	Ruth Jenkins	31-May-2007
TM - Data Protection and Integrity	Closed	Trainer	Ruth Jenkins	31-May-2007
TM - Disaster Recovery	Closed	Trainer	Ruth Jenkins	31-May-2007
TM - Documentation Control	Closed	Trainer	Ruth Jenkins	31-May-2007
TM - Equipment Returns	Closed	Competent	Ruth Jenkins	31-May-2007
TM - External Audits	Closed	Trainer	Ruth Jenkins	31-May-2007

This Report can then be printed or exported as detailed above.

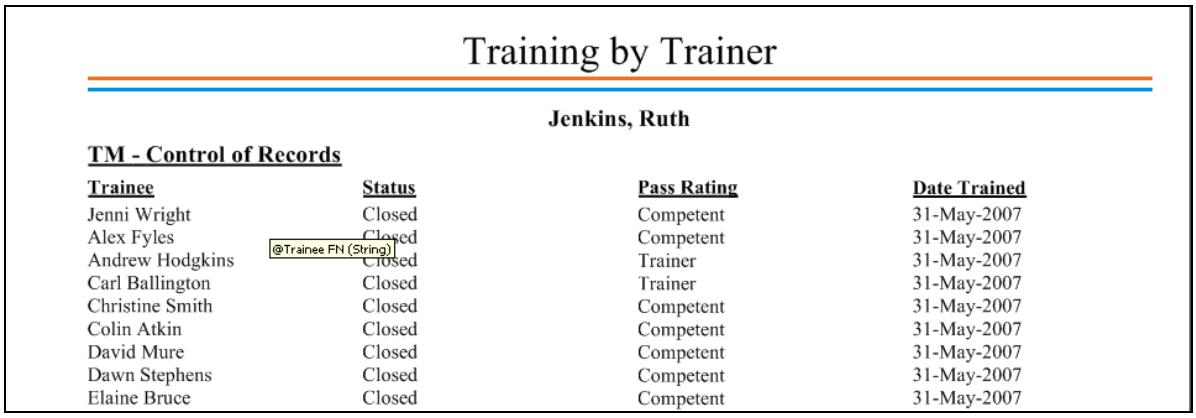
This report type is particularly useful in preparation for one to one meetings or training evaluation and appraisal meetings.

9.3.9.4. Training by Trainer

The “Training by Trainer” report allows an Administrator to use the filtering options in the right panel to produce a report showing which staff were trained by the Trainer for a specific module. It is possible to report on all training modules or a single training module as required.



Clicking on the “View Report” button causes the Training by Trainer Report to be generated on the screen as shown below.



Training by Trainer

Jenkins, Ruth

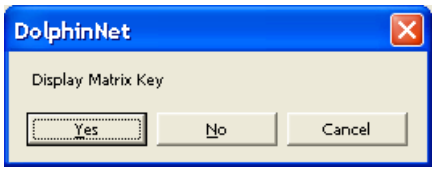
TM - Control of Records

Trainee	Status	Pass Rating	Date Trained
Jenni Wright	Closed	Competent	31-May-2007
Alex Fyles	Closed	Competent	31-May-2007
Andrew Hodgkins	Closed	Trainer	31-May-2007
Carl Ballington	Closed	Trainer	31-May-2007
Christine Smith	Closed	Competent	31-May-2007
Colin Atkin	Closed	Competent	31-May-2007
David Mure	Closed	Competent	31-May-2007
Dawn Stephens	Closed	Competent	31-May-2007
Elaine Bruce	Closed	Competent	31-May-2007

This Report can then be printed or exported as detailed above.

9.3.9.5. Training Matrix

There are no filtering options available for this report. Selecting the “View Report” button on the right hand pane will result in the following popup window:



Select “Yes” and the following report is produced.

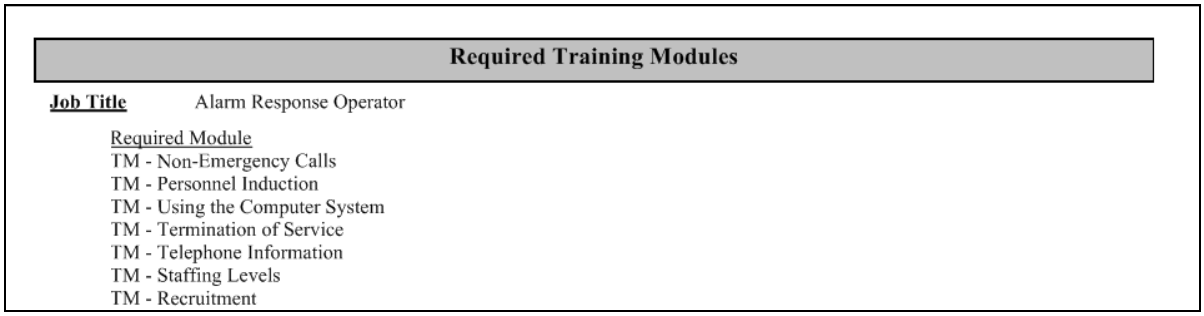
Training Matrix

	Alex	Andrea	Andrew	Carl	Carole	Christine	Colin	David	Dawn	Elaine	Graeme	Jenni	Lesley	Martin	Neil	Pat	Phil	Rod	Ros	Ruth	Sue	Susan
TM - Access to Clients Premises	3	3	3	3		3	3	3	3	3	3	3	3	3	3	3	3	3			3	3
TM - Access to the Centre	3	3	3	3		3	3	3	3	3	3	3	3	3	3	3	3	3			3	3
TM - Account Management		3	3	3	5							3						3	3			
TM - Control of ID Cards	3	3	3	3		3	3	3	3	3	3	3	3	3	3	3	3	3	3			3
TM - Control of Records	3	3	5	5		3	3	3	3	3	3	3	3	3	3	3	3	3	3	5	3	3
TM - Data Protection and Integrity	3	5	5	5		3	3	3	3	3	3	3	3	3	3	3	3	3	3			3
TM - Disaster Recovery		5	5	5																		
TM - Documentation Control		3	5	5																5	3	
TM - Equipment Returns	3	3	5	3		3	3	3	3	3	3		3	3	3	3	3	3	3			3
TM - External Audits		3	5	5																5	3	
TM - Field Staff Operating Procedures	3	3	5	3		3	3	3	3	3	3	3	3	3	3	3	3	3	3			3
TM - Handling Fire Alarm Calls	3	5	5	3		3	3	3	3	3	3		3	3	3	3	3	3	3			3
TM - Handling Telecare Calls	3	5	5	3		3	3	3	3	3	3		3	3	3	3	3	3	3			3
TM - Installation of Telecare Equipment		3	5	3														3	3		3	
TM - Introduction, Purpose and Use of the System		3	3	3								3								5		3
TM - Liaison with Corporate Clients			3	5									3									
TM - Liaison with Key Agencies	3	5	5	5		3	3	3	3	3	3	3	3	3	3	3	3	3	3			3
TM - Management of Complaints	3	5	5	5		3		3	3	3	3	3	3	3	3	3	3	3	3			3
TM - Management of Service Partners			3	5								3										

The report identifies the competency level, e.g. 3 – Competent, of all users registered in Dolphin against the required training modules. This Report can then be printed or exported as detailed above. This report will not show personnel who have subsequently left the organization.

9.3.9.6. Required Modules

There are no filtering options available for this report. Selecting the “View Report” button on the right hand pane will result in the following report.



Required Training Modules

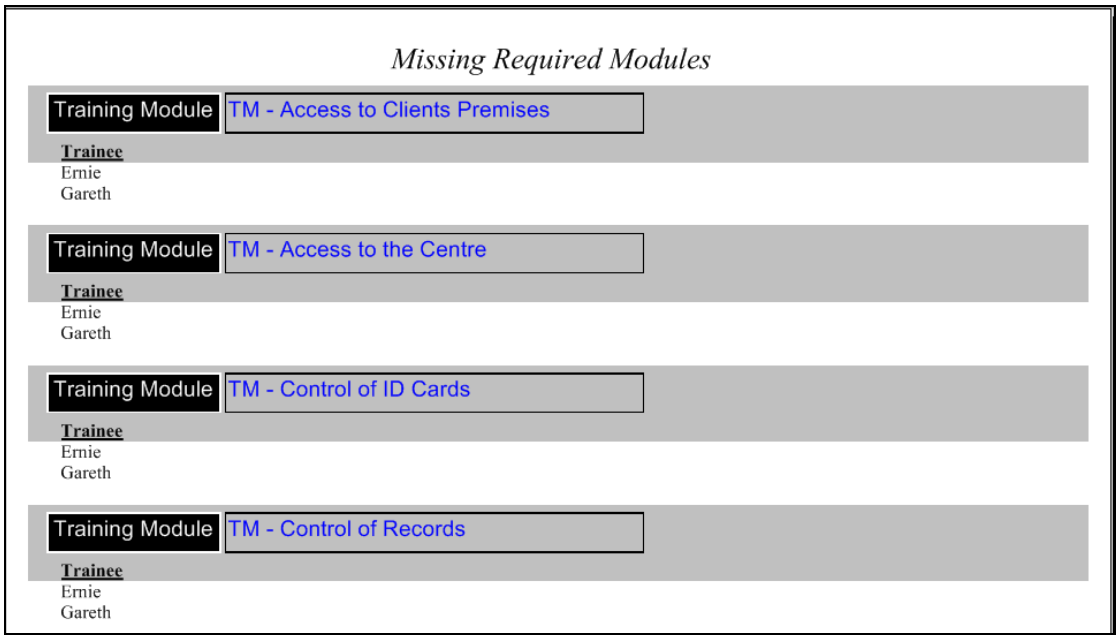
Job Title Alarm Response Operator

Required Module
TM - Non-Emergency Calls
TM - Personnel Induction
TM - Using the Computer System
TM - Termination of Service
TM - Telephone Information
TM - Staffing Levels
TM - Recruitment

The required modules for each job title are listed in the report. This Report can then be printed or exported as detailed above.

Missing by Module

There are no filtering options available for this report. Selecting the "View Report" button on the right hand pane will result in the following report.



Missing Required Modules

Training Module TM - Access to Clients Premises
Trainee
Ernie
Gareth

Training Module TM - Access to the Centre
Trainee
Ernie
Gareth

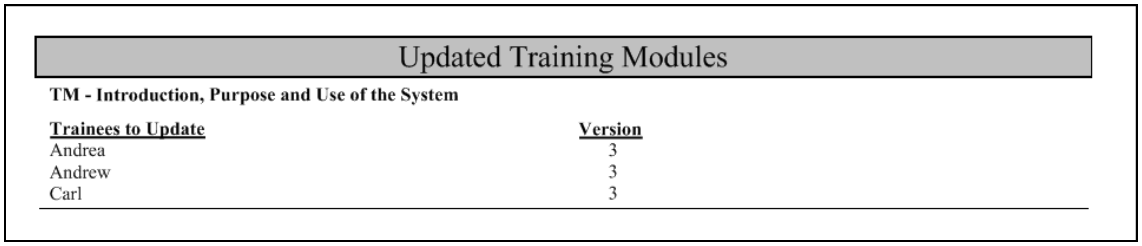
Training Module TM - Control of ID Cards
Trainee
Ernie
Gareth

Training Module TM - Control of Records
Trainee
Ernie
Gareth

The report identifies any areas of outstanding training and the staff requiring the training. This Report can then be printed or exported as detailed above.

9.3.9.7. Updated Modules

There are no filtering options available for this report. Selecting the "View Report" button on the right hand pane will result in the following report.



Updated Training Modules

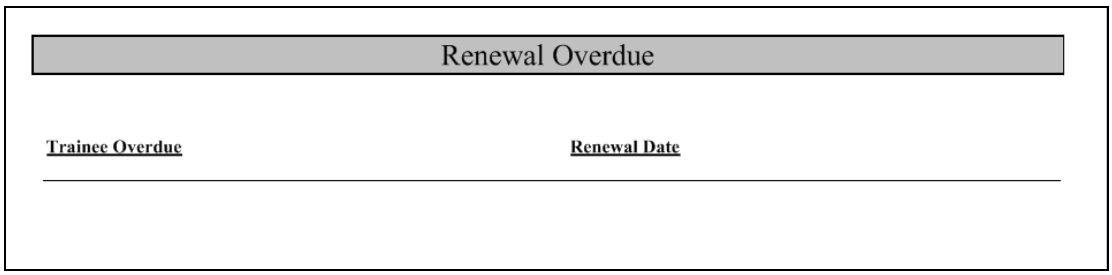
TM - Introduction, Purpose and Use of the System

Trainees to Update	Version
Andrea	3
Andrew	3
Carl	3

This Report can then be printed or exported as detailed above.

9.3.9.8. Renewal Overdue

There are no filtering options available for this report. Selecting the “View Report” button on the right hand pane will result in the following report.



Renewal Overdue

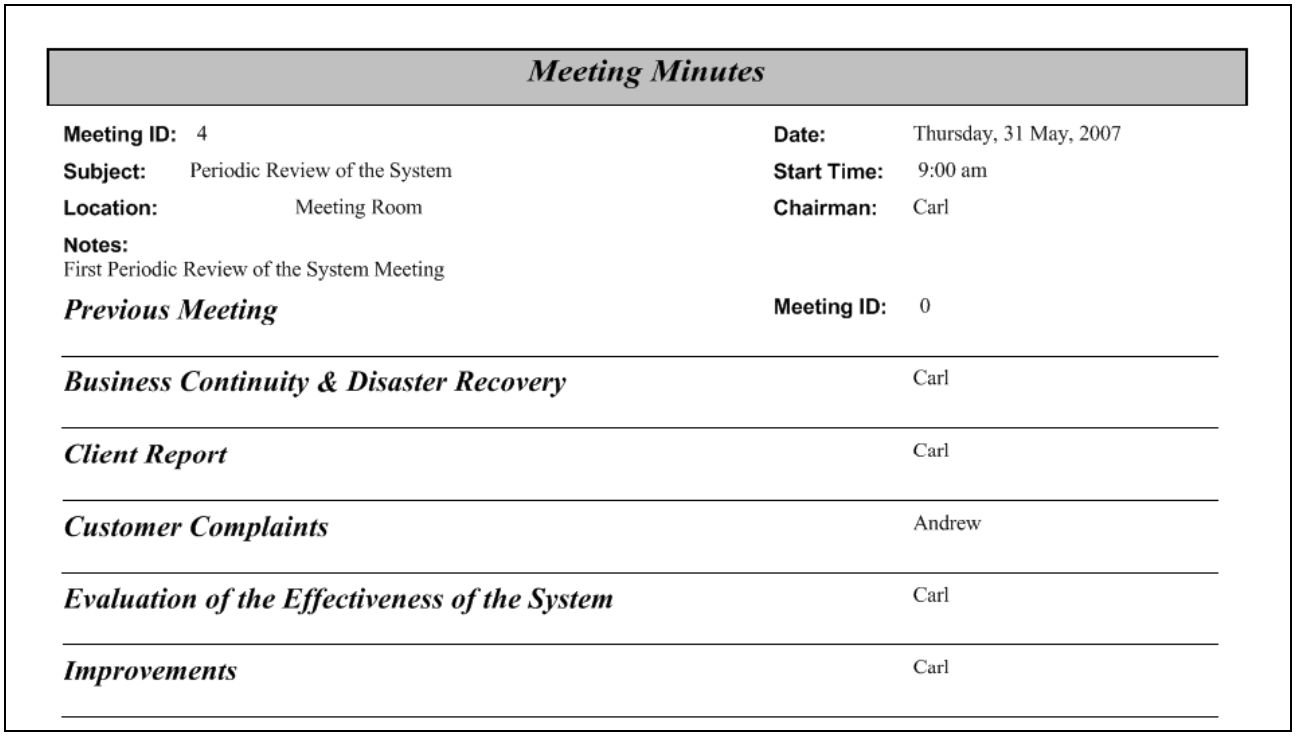
Trainee Overdue	Renewal Date

The report will list the names of the Trainees overdue for training, e.g. refresher training and the date the training was due. This Report can then be printed or exported as detailed above.

9.3.10. Meeting Reports

9.3.10.1. Meeting Report

There are no filtering options available for this report. Selecting the “View Report” button on the right hand pane will result in the following style of report.



Meeting Minutes

Meeting ID: 4 **Date:** Thursday, 31 May, 2007

Subject: Periodic Review of the System **Start Time:** 9:00 am

Location: Meeting Room **Chairman:** Carl

Notes:
First Periodic Review of the System Meeting

Previous Meeting **Meeting ID:** 0

Business Continuity & Disaster Recovery	Carl
Client Report	Carl
Customer Complaints	Andrew
Evaluation of the Effectiveness of the System	Carl
Improvements	Carl

This Report can then be printed or exported as detailed above.

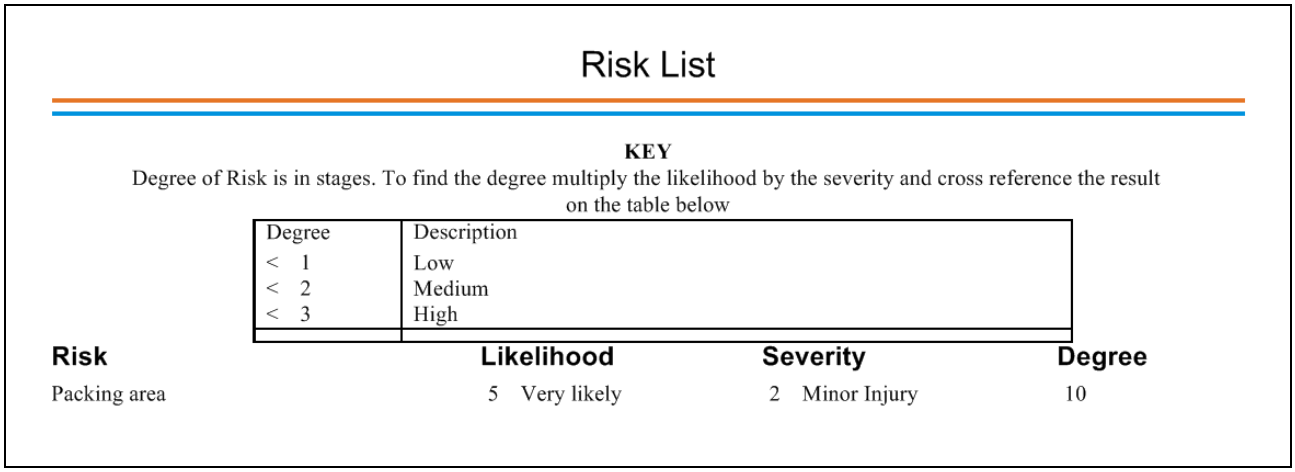
9.3.11. Schedule Reports

9.3.12. Equipment Reports

9.3.13. Risk Reports

9.3.13.1. Risk List

There are no filtering options available for this report. Selecting the “View Report” button on the right hand pane will result in the following style of report.



Risk List

KEY

Degree of Risk is in stages. To find the degree multiply the likelihood by the severity and cross reference the result on the table below

Degree	Description
< 1	Low
< 2	Medium
< 3	High

Risk	Likelihood	Severity	Degree
Packing area	5 Very likely	2 Minor Injury	10

The report will display a list of those risks identified within the organization.

9.3.13.2. Risk Assessment Detail

There are no filtering options available for this report. Selecting the “View Report” button on the right hand pane will result in the following style of report.

Assessment Detail

ID 1

Description

Assessor Administrator 1 **Manager** Manager 2 **Date** 07-June-2007

Type Annual Check **Group** Factory **Item** Conveyot belt

Previous Assessment

ID **Date**

Results

Risks

Area Packing area

Likelihood 5 / Very likely

Severity 2 / Minor Injury

Risk Identified Trip hazard

Description There were trip hazards in the packing area because someone had left packed items lying around on the floor. This could lead to an accident where someone could fall onto the conveyor.

Sign Off

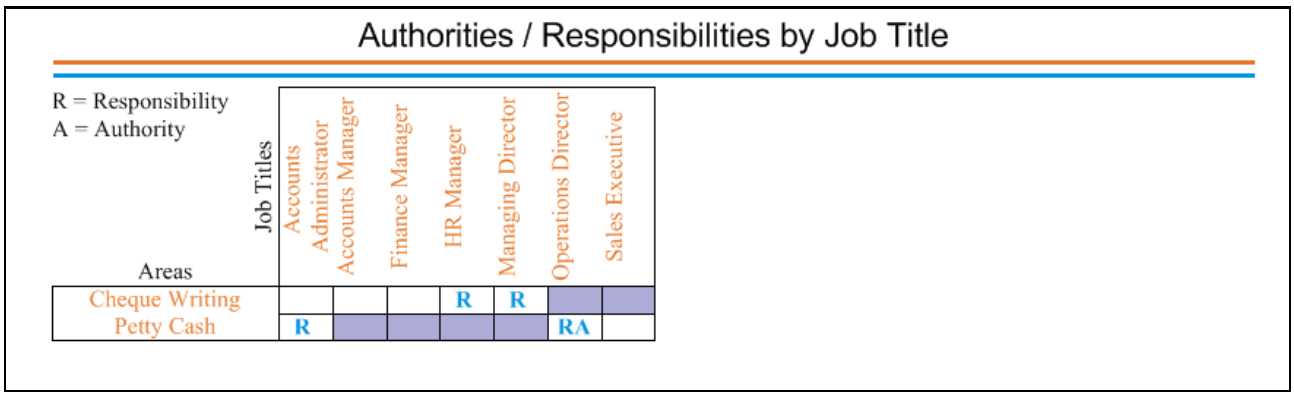
Assessor Signed No **Manager Signed** No **Complete** No

This report will provide reference to any previous risk assessment undertaken for this area/activity. It provides details of the person undertaking the risk assessment, when the risk assessment occurred, the risks identified and their severity/likelihood if realized and a detailed description of the risk assessment. It will also show if the assessment has been signed off and is complete.

9.3.14. Responsibilities/Authorities

9.3.14.1. Responsibilities / Authorities Matrix by Job Title

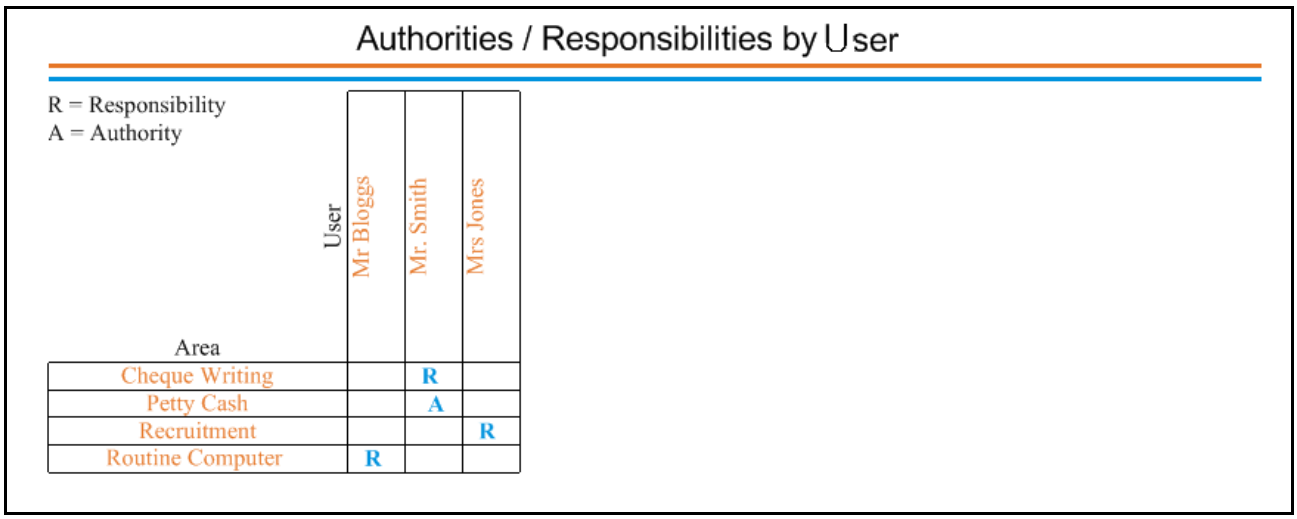
There are no filters available on this report. Selecting the "View Report" button will generate a matrix similar to the one shown below:



This report will assist the management team with identifying key areas of responsibility and authority for individual job roles. When considering recruiting new personnel to a role, this may provide useful information about the competencies expected of the applicants.

9.3.14.2. Responsibilities / Authorities Matrix by User

There are no filters available on this report. Selecting the "View Report" button will generate a matrix similar to the one shown below:

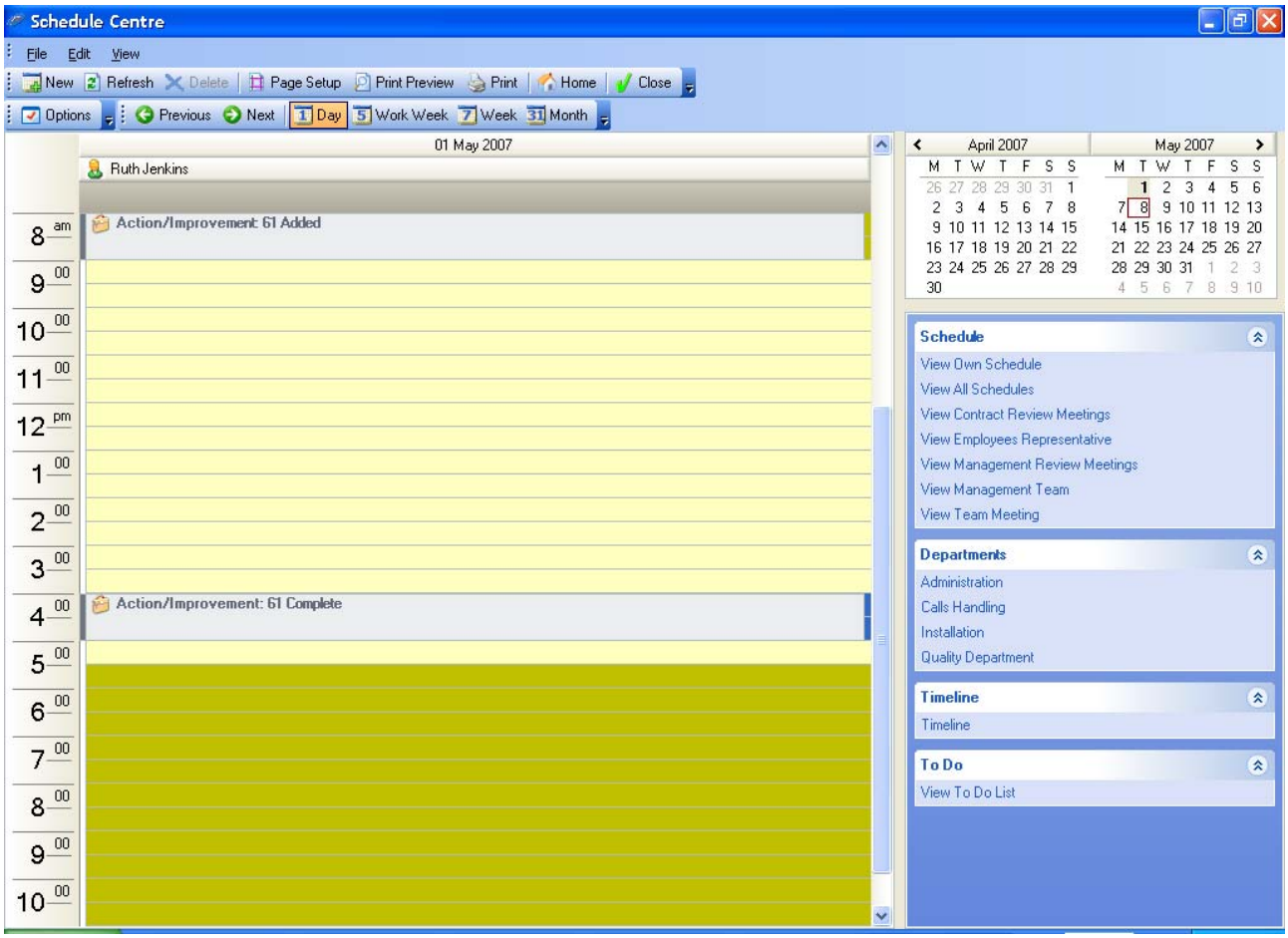


Chapter 10. Schedule Centre

10.1. Introduction

The Schedule Centre is a fully functional calendar and diary system that is designed to integrate fully with the records databases stored within Dolphin. The Scheduler can be set up to show a single day, a 5-day week, a 7-day week or a month at a time.

The User can also select whether to show the small view calendars on the right hand-side of the main panel. The User can also view information grouped by department or user type and also a “To Do” list.

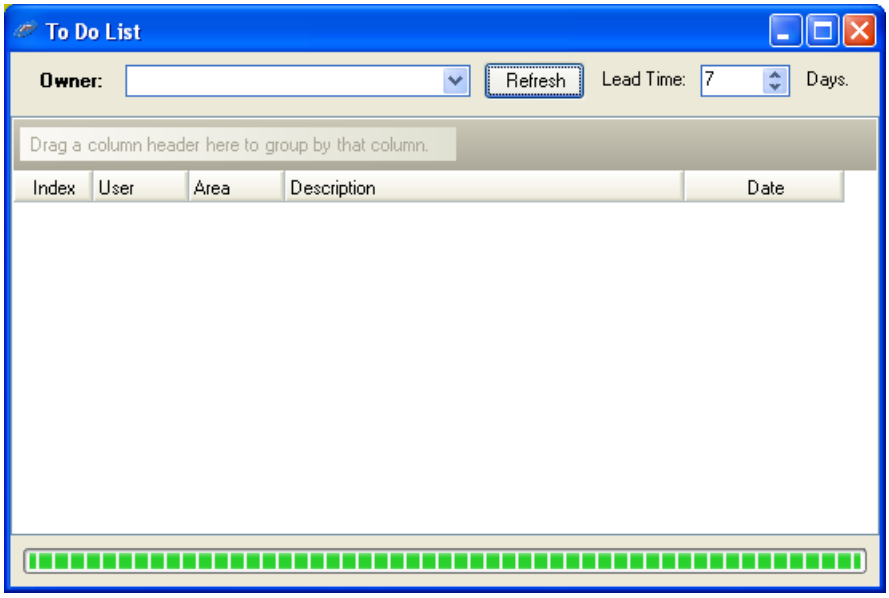


To Do List

This list is populated when the following processes are at an incomplete stage as a reminder to the owner as to what actions remain outstanding, e.g.

- Internal Audits
- Actions / Improvements, including those which have not been submitted
- Customer Care Record
- Training Reminder for Trainee and Trainer
- Training Report Reminder for Trainee, Trainer and Manager
- Training Results Reminder for Trainee, Manager
- Risk Review

- Equipment Records (added to list 7 days prior to due date to allow sufficient preparation time)



The To Do list can allow all Personnel to be shown (HR Only) all within a department (Manager Only) or just the current user (Standard Operator). Double clicking on a to-do list item allows it to be opened and edited. The list currently defaults to events in the forthcoming 7 days but this may be altered as required.

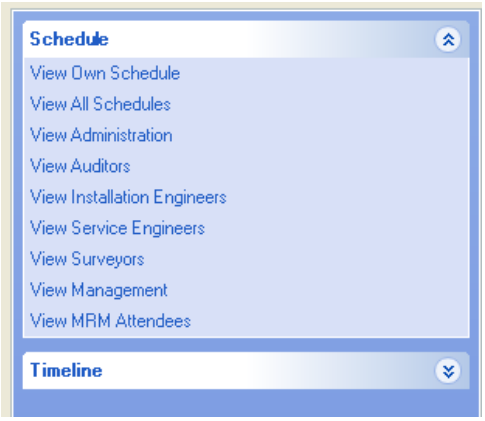
10.2. User Accounts

As a new User is added to the system, a Schedule Centre Account is automatically generated. All reminders and appointments for that User are automatically posted and may be accessed in the Schedule Centre.

After a User logs in to the system, Dolphin quickly checks the Schedule Centre for any "Appointments" that may be due or overdue and posts a reminder to the User. These may not actually be appointments (although they are listed as such in the Schedule Centre) but could be training sessions, actions and improvements deadlines, audits due, calibration tasks overdue, etc.

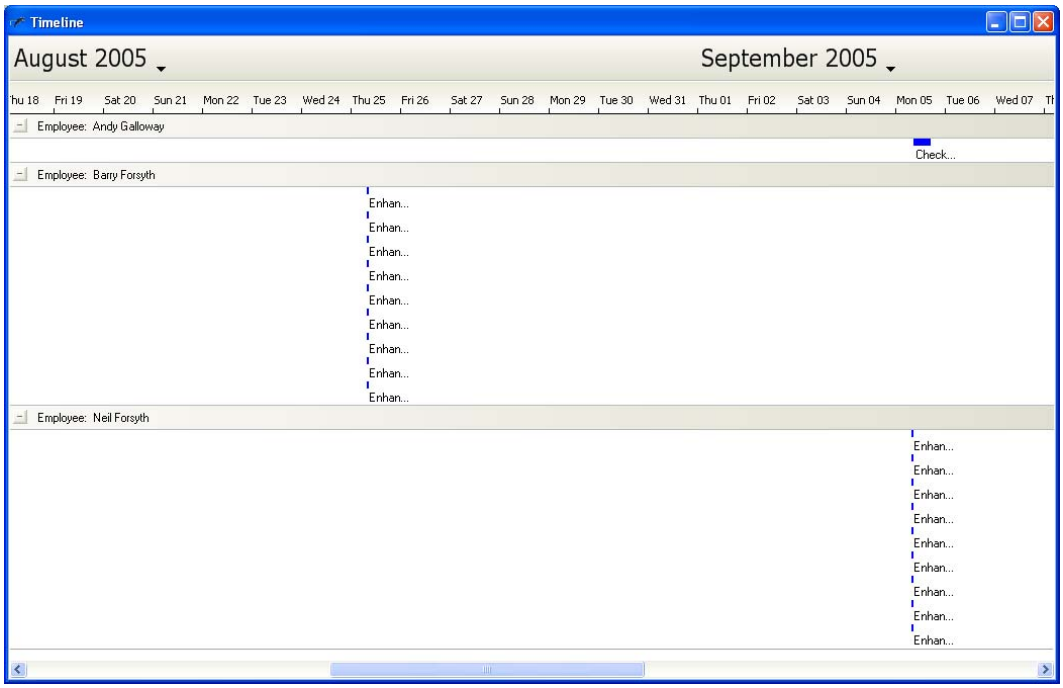
10.3. User Type

When a new "User Type" is added to the Subrecords, a new group is added to the Schedule Centre under the list of Schedules. By selecting a "Schedule" from that list, the diaries of all of the Users assigned to that "User Type" are available to view in the main panel. This is useful for scheduling meetings, checking availability of personnel i.e. "Which engineer is free on Thursday morning?", scheduling training sessions, etc.


Schedule
View Own Schedule
View All Schedules
View Administration
View Auditors
View Installation Engineers
View Service Engineers
View Surveyors
View Management
View MRM Attendees
Timeline

10.4. Timeline

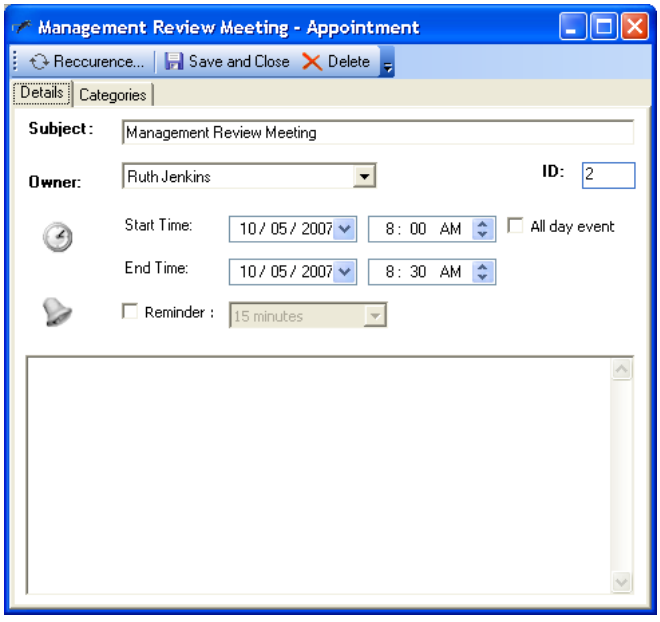
In the Timeline View, it is possible to view all of the activity of any User (subject to having the correct authorities). The timeline automatically defaults to the current date.



Most automatically generated “Appointments” are scheduled for 30 minutes. Therefore, they do not show much detail in this view.

10.5. Generating a New Appointment

When an appointment is generated via the “New Appointment” button the following window appears:

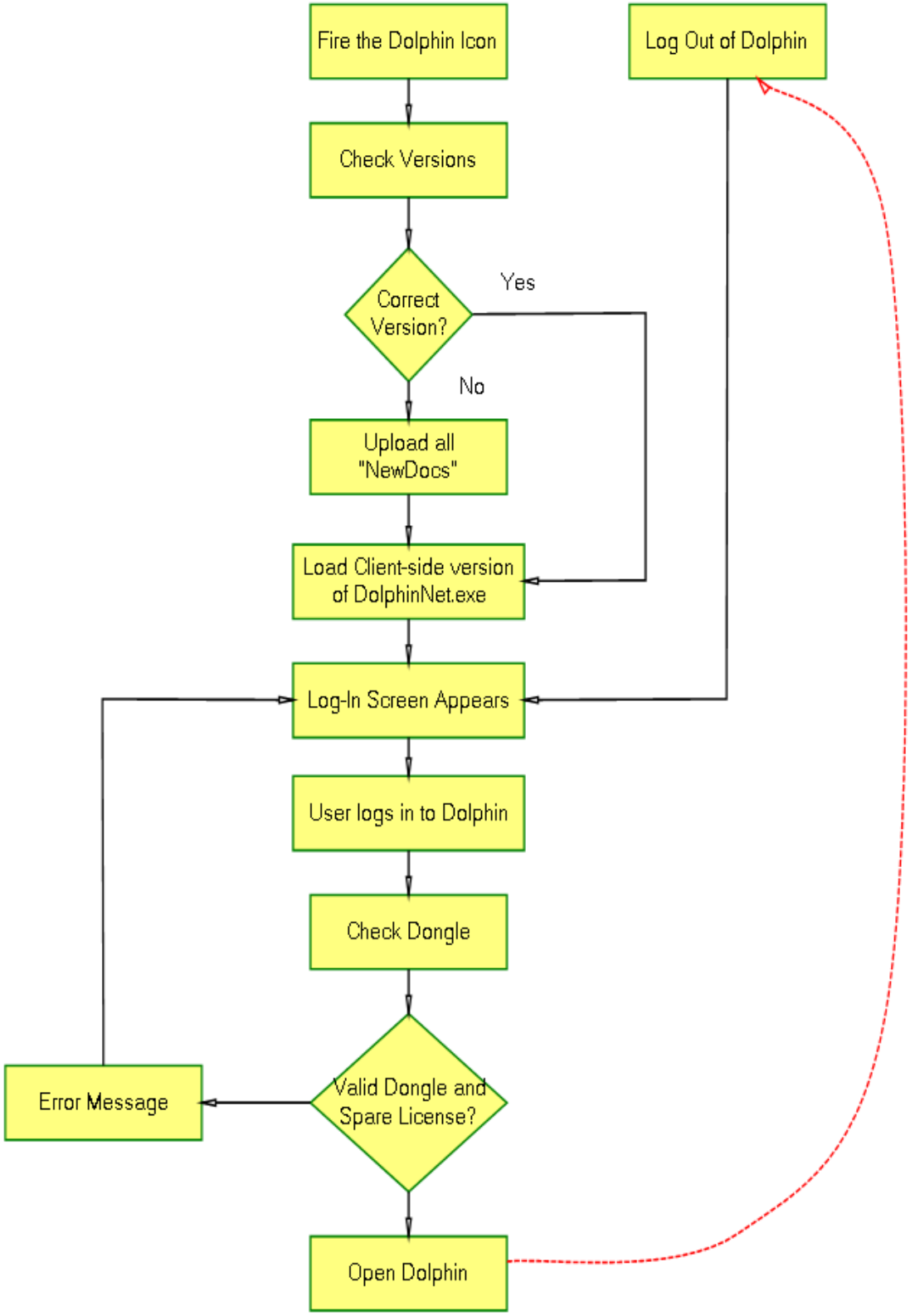


If required the appointment may be selected as a recurring appointment by choosing:

Closing the appointment will refresh and update the Schedule automatically. Also, if it is necessary to move an appointment date, e.g. 10/05/07 moves to 17/05/07, the appointment can be dragged to the new date and this will update the schedule.

Chapter 11. Dolphin Loader.Exe

The flowchart below describes how Dolphin Loader. Exe controls the logging into and out of the Dolphin System.



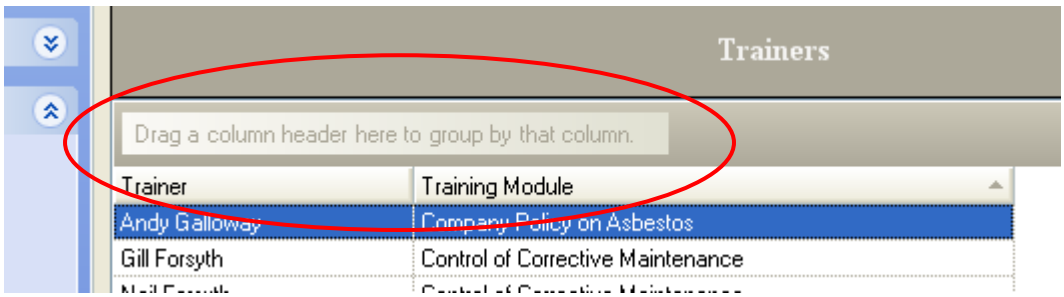
When the Dolphin icon is double clicked Loader. Exe will check the local and network versions of Dolphin.Net and uploads the new version if required. The log-in screen will then appear and allow a user to log into the system as described above.

Chapter 12. Miscellaneous

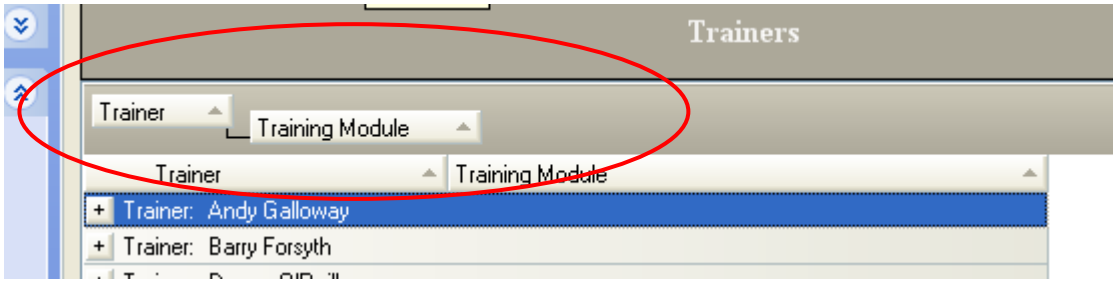
12.1. Creating Sorts on Groups

In many views within Dolphin, it is possible to sort lists and records by any of the groups within that list. In some views this feature is permanently enabled.

In other views it can be toggled on and off using the “Groups” button.



With the Groups option enabled, drag one of the column headers onto the “Groups” area that has appeared above the column headers bar. This will automatically sort the records into groups based on that header. Selecting more than one header will create subgroups below that group, etc.



Once created, a grouping will remain set up until another sort is created or until the sort is undone.

To undo a sort created this way, drag the headings back from the Groups area to their positions on the Header Bar, above the columns.

Chapter 13. Appendixes

13.1. Appendix A - Installation

13.1.1. Windows 98

Instal Internet Explorer 6 with Service Pack 1
Instal VB5 Runtime
Instal Jet 4.0
Instal .NET Framework 1.1
Instal Microsoft Data Access Components V6 (MDAC 2.7)
Instal Rainbow Combo Driver 1.0.5
Instal Dolphin

13.1.2. Windows ME

Instal Internet Explorer 6 with Service Pack 1
Instal .NET Framework 1.1
Instal Microsoft Data Access Components V6 (MDAC 2.7)
Instal Rainbow Combo Driver 1.0.5
Instal Dolphin

13.1.3. Windows 2000

Instal Windows 2000 Service Pack 4
Instal .NET Framework 1.1
Instal Microsoft Data Access Components V6 (MDAC 2.7)
Instal Rainbow Combo Driver 1.0.5
Instal Dolphin

13.1.4. Windows NT4

?

13.1.5. Windows XP Home

Instal .NET Framework 1.1
Instal Rainbow Combo Driver 1.0.5
Instal Dolphin

13.1.6. Windows XP Pro

Instal .NET Framework 1.1
Instal Rainbow Combo Driver 1.0.5
Instal Dolphin

13.1.7. Upgrade to XP Pro

Instal Microsoft Data Access Components V6 (MDAC 2.8)

13.1.8. Dolphin Network Assistant

13.2. Appendix B - Post Installation

13.2.1. Introduction

Once the software is installed, an integral part of how the system operates is dependent on how each client computer is set up. The system is installed with two data areas, one is for live data and the other is a set of test data and a "training" area. During installation, the software would have created two icons and placed them on the desktop of the computer, one for the "Live" system and one for the "Test" system. It is important that the two icons point at the programme (DolphinNet.exe or Loader.exe - see below) and the Target Area points to the "Live" or "Test" area depending on which icon it is (see below). This is set up in the Properties of the two icons.

The Live system will contain the actual files being used for the system that is being developed i.e. the Quality Management System, HAS Management System, etc.

The Test data area will ship with a few examples of each type of record and a few Process Maps and documents. This is the practice area where Users can create and destroy records and amend process maps and documents to gain experience in how the software works.

13.2.2. Stand-Alone System

For a stand-alone system, the server and the client computer are the same machine. In Preferences, the "Network Address" is to be set at 127.0.0.1 and the dongle inserted into the correct port on this computer.

The programme used to run the stand-alone system is called DolphinNet.exe and it is located in C:\Program Files\Dolphin Software. Data files (documents, process maps, etc) for the "Live System" are located in C:\Program Files\Dolphin Software\Live. Data files for the "Test System" are located in C:\Program Files\Dolphin Software\Test.

Updates to the DolphinNet.exe file is by replacing the programme file with the new version.

13.2.3. Network System

For a network system, the server and the client computers are different machines. Instal the software onto the Server first as if it was a stand-alone machine and attach the dongle to the correct port on this computer.

Change the "Network Address" in Preferences to show the IP Address of the server where the dongle resides. Set up (i.e. move) the "Live" data area to a location on the server where all client machines will be able to access it. Make a note of this location.

Dolphin is a robust system which will maintain its connection from your PC to the server even while your PC is hibernating, and the only time connection will be lost would be if during this period all user licenses were being used.

The programme used to run the networked system is called Loader.exe and it is located in C:\Program Files\Dolphin Software.

Updates to the DolphinNet.exe file is by replacing the programme in the “Live” data area file with the new version. When next activated from a client machine, Loader.exe will update the DolphinNet.exe programme on that client computer.

The “Test” area in a networked system can either be that each client machine uses its own “Test” data area, or the icons can be reprogrammed to point at a central “Test” data area that is accessible to all client machines, or both, or any combination.

13.2.4. Activating the Software

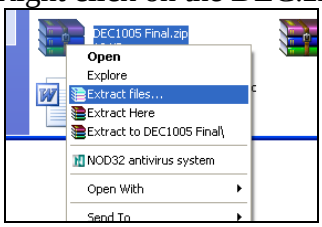
When using the software for the first time on any given machine, you will activate a “Security Unlock” screen. This message reads: “Welcome to Dolphin Intelligent Software. This software needs to be activated on this computer before its first use. Please telephone Dolphin Support on 0870 445 1234 for an unlock code. You will need to quote the following information:” followed by the dongle serial number and the local name of that computer. Enter the unlock code that you are given in the prescribed format and click on the “Done” button.

13.2.5. Installing Event Checker onto Dolphin

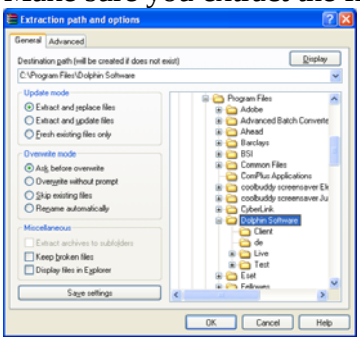
Event Checker will monitor the Dolphin system for you whether or not Dolphin is running on your PC identifying events which require either your attention or involvement and then flag them up for you as a reminder at both 7 days and 1 day prior to the event taking place.

1. Copy the latest DEC.zip file on to your network where you store your Quality System (Dolphin)

2. Right click on the DEC.zip file and click on ‘Extract files...’

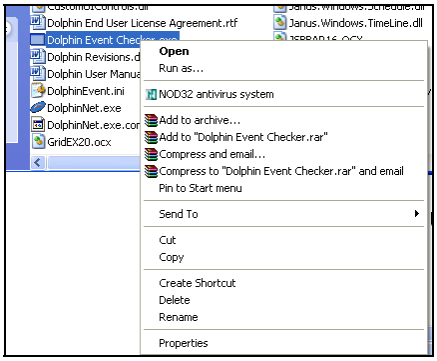


3. Make sure you extract the files to the C drive



4. Replace the exiting Dolphin Event Check (DEC) in the C:\Program Files\Dolphin Software

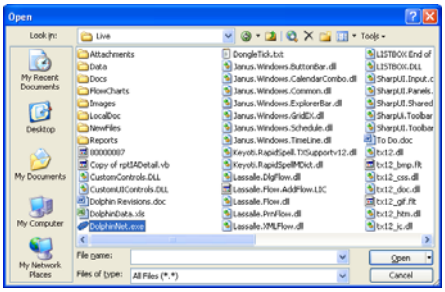
5. Right click on Dolphin Event Check in the C:\Programms Files\Dolphin Software and click on "Create shortcut"



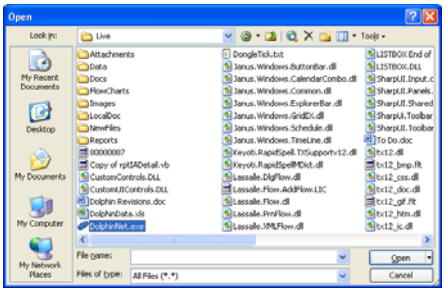
6. Click on "Start", "All Programs", then right click on "Startup", choose "Explore All Users" to open the all users explore window.

7. Move the Shortcut Dolphin Event Checker to the all users window.

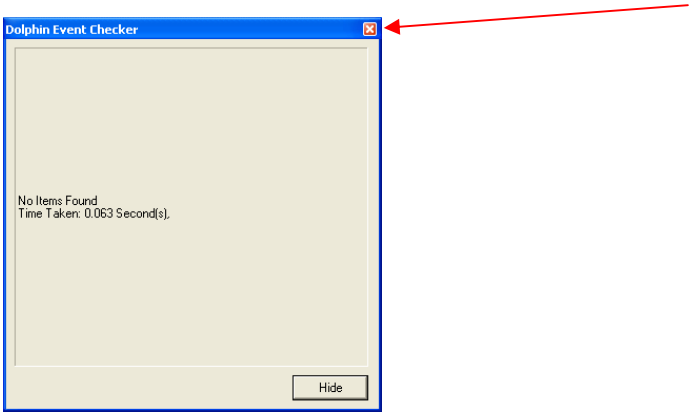
8. Change the file name to Dolphin Event Checker and change the icon to a Dolphin (Right click on DEC file and click on "properties", then click 'change icon', browse C:\Program Files\Dolphin Software, click on any file with the logo.)



9. Double click on the DEC.exe it should have a window pop up where you can direct the Event Check to search the data from. (It should be directed to the Dolphin Live folder on your network where you store your dolphin data.). Select on any file in the Live folder then click "open" tab.



10. Double click on the DEC.exe again to run Dolphin Event Check. (*Please be patient to wait for the program to search the data from your server, if you click on the red cross on the right corner the program will be closed.)



11. It is very important that your window log name in Dolphin must be exactly same with your log name to the PC Window. You can change the Dolphin log name in the User Centre in Dolphin.

13.2.6. Multiple Dongle Addresses

Multiple Dongle addresses are available via the C:\ IPA.TXT file, if required. Enter a list of IP Addresses to check for the dongle. Write Access to the server or hard drive is required the first time this application is run on a PC. The Program first looks at the Database for the IP Address if the IPA file does not exist and creates this file.

13.3. Appendix C - Index

A

Access · 3-1, 3-3, 3-4, 3-6, 4-2, 4-5, 5-46, 5-47, 5-50, 5-51, 5-59, 5-60, 7-4, 7-6, 7-8, 7-19, 7-22, 7-30, 8-2, 9-17, 9-18, 12-1, 12-2, 12-5
Access Rights · 3-1, 3-3
Accreditation · 2-1
Action · 5-12, 5-15, 5-18, 5-20, 5-21, 5-23, 5-24, 5-25, 5-26, 5-31, 5-32, 5-37, 5-40, 5-49, 5-54, 5-55, 5-68, 5-69
Actionee · 5-23, 5-24, 5-25, 5-26
Actions · 3-2, 3-6, 4-2, 4-8, 5-1, 5-2, 5-4, 5-12, 5-13, 5-15, 5-16, 5-17, 5-18, 5-19, 5-20, 5-21, 5-23, 5-24, 5-25, 5-26, 5-30, 5-31, 5-32, 5-33, 5-37, 5-40, 5-49, 5-51, 5-54, 5-55, 5-59, 5-68, 5-69, 6-1, 6-3, 6-4, 7-20, 7-32, 9-2, 9-9, 10-1, 10-2
Actions and Improvements · 3-6, 5-15, 5-18, 5-20, 5-26, 5-31, 5-32, 5-51, 9-2, 10-2
Actions/Improvements · 3-6, 5-12, 5-15, 5-16, 5-18, 5-40, 5-49
Activate · 8-14, 12-3
Administrator · 3-3, 3-6, 3-7, 4-2, 4-7, 4-8, 5-1, 5-3, 5-10, 5-37, 5-46, 5-47, 5-50, 5-51, 5-59, 5-61, 5-72, 5-74, 7-1, 7-2, 7-3, 7-5, 7-6, 7-21, 8-8, 9-17, 9-18
Assign RMs · 5-3, 5-7, 5-8
Attachments Tab · 5-16, 5-19, 5-32, 5-36, 5-40, 5-51
Audit · 3-2, 3-6, 5-1, 5-3, 5-12, 5-13, 5-14, 5-15, 5-17, 5-19, 5-20, 5-51, 5-59, 5-60, 5-70, 5-73, 5-74, 6-3, 9-4, 9-6, 9-7, 9-8, 9-9, 9-11, 9-12, 9-13, 9-14, 9-16, 9-17, 9-18, 10-1
Audit Trail · 5-14, 5-15, 5-17, 5-59, 5-60, 5-73, 5-74
Auditee · 5-15
Auditor · 2-1, 5-14, 5-15, 5-17, 5-51
Authorize · 5-21, 5-22, 5-23, 5-51
Auto Mail · 4-1, 7-18

B

business effectiveness · 2-1
Business effectiveness · 2-1

C

Calibration · 5-20, 5-57, 10-2
Consultants · 2-1
Continual Improvement · 2-1
Coordinator · 4-2, 4-7
Corporate Social Responsibility · 2-1
Correction · 5-12, 5-20, 5-21, 5-26
Corrective Action · 5-12, 5-20, 5-21, 5-26
Customer Care · 3-2, 5-29, 5-30, 5-31, 5-32, 5-33, 5-51, 5-68, 5-69, 6-3, 9-12, 9-13, 10-1
customizable · 3-1, 3-4, 3-6, 5-1, 8-3
Customizable · 3-1, 3-4, 3-6, 5-1, 8-3

D

Data Centre · 3-2, 3-4, 3-6, 4-5, 4-8, 5-1, 5-3, 5-10, 5-13, 5-17, 5-20, 5-27, 5-30, 5-34, 5-37, 5-38, 5-46, 5-49, 5-52, 5-55, 6-3, 9-3
Database · 3-4, 4-2, 4-7, 5-13, 5-28, 5-29, 5-31, 5-53, 5-63, 5-65, 5-66, 5-73, 6-3, 8-2, 8-10, 8-11, 12-5
Default Cell · 4-7
Default Printer · 7-19, 8-7
department · 3-3, 5-14, 5-59
Department · 3-3, 5-14, 5-50, 5-51, 5-59, 5-60, 5-74, 10-1, 10-2
designator · 4-2, 8-10
Designator · 4-2, 8-10
development · 2-1
Development · 2-1
Doc Group · 4-2
Documentation Control · 2-1, 5-20
documents · 2-1, 3-1, 3-3, 3-7, 5-13, 5-14, 5-17, 5-19, 5-32, 5-40, 5-41, 5-51, 5-52, 5-55, 5-70, 7-6, 8-1, 8-2, 8-3, 8-10, 8-11, 8-12, 8-13, 8-14, 8-16, 8-19, 12-2
Documents · 2-1, 3-1, 3-3, 3-4, 3-7, 4-7, 4-8, 5-13, 5-14, 5-17, 5-19, 5-32, 5-40, 5-41, 5-51, 5-52, 5-55, 5-70, 6-3, 7-6, 8-1, 8-2, 8-3, 8-5, 8-6, 8-7, 8-10, 8-11, 8-12, 8-13, 8-14, 8-16, 8-18, 8-19, 12-2
Dolphin Document · 3-6, 4-4, 6-3
Dolphin Support · 3-5, 12-3

E

Edit Menu · 3-4, 7-20, 7-26, 7-27, 7-28, 7-31, 8-13, 8-14
Environmental · 2-1
Equipment · 3-2, 5-42, 5-57, 5-58, 5-59, 5-60, 5-71, 5-72, 6-3
Equipment List · 5-57, 5-71, 5-72
Equipment Type · 5-57, 5-58, 5-59, 5-60, 5-71
Explorer Bar · 3-1, 3-4, 3-6, 4-3, 4-4, 4-5, 4-7, 5-10, 5-12, 5-53, 8-3, 8-4, 8-10, 8-11
External Audit · 3-2, 5-17, 5-20, 5-51, 5-70, 6-3
External Document · 3-6, 4-5, 6-3
External Program · 3-7, 4-5
External Training · 4-8, 5-40, 5-49, 5-64

F

filenames · 4-2
Filenames · 4-2
Footer · 4-7, 8-6, 8-8
Frequency · 5-39, 5-57, 5-71, 5-72, 5-73
functionality · 2-1, 3-1, 5-12, 5-13, 5-17, 5-19, 5-20, 5-32, 5-36, 5-41, 5-52, 5-55, 5-59, 7-6, 7-18, 7-30, 7-32, 8-2
Functionality · 2-1, 3-1, 5-3, 5-12, 5-13, 5-17, 5-19, 5-20, 5-32, 5-36, 5-41, 5-52, 5-55, 5-59, 5-64, 7-6, 7-18, 7-30, 7-32, 8-2, 9-3

G

Grouping · 4-2, 4-3, 5-1, 5-29, 5-62, 11-1

H

Header · 4-7, 6-3, 8-8, 11-1
Health and Safety · 2-1
Help Menu · 3-5, 7-25

I

Improvement · 3-2, 5-12, 5-15, 5-18, 5-20, 5-21, 5-22, 5-23, 5-24, 5-25, 5-26, 5-32, 5-37, 5-68, 5-69, 9-2, 9-8, 9-9
IMS Centre · 3-3, 3-4, 3-6, 4-7, 4-8, 5-7, 5-26, 5-38, 5-63, 5-64, 6-3, 7-6, 8-1, 8-2, 8-3, 8-4, 8-9, 8-11, 8-12, 8-18, 9-4
Information Security · 2-1
Internal Training · 5-40, 5-49, 5-50, 5-63, 5-66

L

Link Explorer · 3-6, 3-7, 4-3, 7-6
Links · 3-1, 3-6, 4-3, 4-5, 5-61, 5-64, 7-1, 7-5, 7-11, 7-14, 7-16, 7-17, 7-21, 7-26, 7-27, 7-28, 7-30, 7-31, 7-32, 8-1, 8-3, 8-10, 8-11, 8-12, 8-19
logos · 3-1
Logos · 3-1
Lotus · 3-7

M

Mail Centre · 3-3, 3-6, 4-1, 4-5, 6-1, 6-3
Main Page · 3-1, 4-2, 5-3, 5-46, 6-1, 6-3, 7-20, 7-26, 8-4, 8-9, 8-10, 9-2
main panel · 3-1
Main panel · 3-1, 5-1, 5-10, 10-1, 10-2
Manage Training · 5-3, 5-6, 5-37, 5-38
Meetings · 3-2, 5-12, 5-53, 5-54, 5-56, 5-75, 6-3, 10-2
Menu Bar · 3-2, 5-3, 7-18, 9-3
Microsoft Access · 3-6
Microsoft AutoRoute · 3-7
Microsoft Word · 3-6, 8-2, 8-3
Minutes · 5-12, 5-53, 5-54, 5-55, 5-56, 10-3
Missing Required Modules · 5-3, 5-37
MS Word · 8-1

N

Network · 2-1, 4-2, 5-10, 5-13, 12-2, 12-3, 12-4
Notifiers · 4-2

O

Only One Expanded · 4-1, 8-4
Originator · 5-21, 5-22, 5-23, 5-24, 5-25, 5-26
Outlook · 3-3, 3-6, 4-1, 4-5, 5-47, 6-3, 6-4
Outlook Link · 3-6, 4-5

P

Paperless · 2-1
Passed Renewal Date · 5-3, 5-5, 5-6, 5-37
Password · 3-4, 5-39, 5-40, 5-44, 5-50, 5-55, 5-56
PDF · 3-6, 7-6, 8-3, 8-18, 8-19, 9-4
Preferences · 3-1, 3-4, 3-6, 3-7, 4-1, 4-7, 5-33, 5-47, 5-49, 6-3, 7-6, 7-21, 7-31, 8-4, 8-8, 8-10, 12-2
Preventive Action · 5-12, 5-20, 5-21, 5-26, 5-32
Preview · 4-2, 5-1, 5-18, 5-29, 5-30, 5-32, 7-19, 7-20, 7-26, 8-2, 8-7, 8-9
Print · 5-3, 5-5, 5-6, 5-7, 5-13, 6-3, 7-19, 7-20, 7-26, 7-27, 7-30, 8-2, 8-4, 8-5, 8-7, 8-8, 8-9, 9-3, 9-8, 9-9
Print Preview · 7-19, 7-20, 7-26, 8-2, 8-7, 8-8, 8-9
process area · 3-1
Process Area · 3-1
Process Audit · 5-15
Process Centre · 3-3, 3-6, 4-1, 4-7, 5-38, 6-3, 7-1, 7-4, 7-18, 7-20, 7-24, 7-26, 7-28, 7-30, 7-31, 8-9, 8-12, 9-2
Process Map · 2-1, 3-1, 4-7, 5-14, 5-51, 6-3, 7-1, 7-2, 7-3, 7-4, 7-5, 7-6, 7-19, 7-22, 7-24, 7-28, 8-10, 8-11, 8-12, 8-16, 12-2
Process Mapper · 7-1, 7-2, 7-3, 7-5, 7-22
process mapping · 2-1, 3-3
Process Mapping · 2-1, 3-1, 3-3
Process Maps · 2-1, 4-7, 5-14, 5-51, 6-3, 7-1, 7-5, 7-21, 12-2
Processes · 3-1, 4-4, 4-7, 5-14, 5-42, 5-49, 5-74, 7-1, 7-21, 8-12, 10-1
Proposed Completion Date · 5-21, 5-23, 5-25

Q

Quality · 2-1, 5-67, 12-2, 12-3
Quit · 3-3, 7-30, 8-5

R

Records · 2-1, 3-2, 3-3, 3-4, 4-8, 5-1, 5-2, 5-3, 5-4, 5-5, 5-6, 5-7, 5-9, 5-10, 5-12, 5-13, 5-14, 5-15, 5-17, 5-19, 5-20, 5-21, 5-27, 5-29, 5-30, 5-31, 5-32, 5-33, 5-34, 5-36, 5-37, 5-38, 5-39, 5-40, 5-41, 5-43, 5-44, 5-46, 5-47, 5-49, 5-50, 5-51, 5-52, 5-53, 5-54, 5-55, 5-56, 5-57, 5-58, 5-59, 5-60, 5-61, 5-62, 5-64, 5-65, 5-66, 5-67, 5-68, 5-69, 5-71, 5-72, 6-3, 9-4, 9-8, 9-9, 10-1, 11-1, 12-2
Renewable · 5-5, 5-6, 5-37
Renewal Date · 5-3, 5-5, 5-6, 5-37
Report Centre · 3-3, 3-6, 4-5, 5-3, 5-13, 5-47, 5-56, 6-3, 9-1, 9-8, 9-9
Report Viewer · 9-2, 9-3, 9-5
Required Modules · 5-3, 5-5, 5-7, 5-8, 5-9, 5-37, 5-59, 5-60, 5-61, 5-64, 5-65, 5-69, 9-19
Reseller Details · 3-4, 3-5

S

Schedule Centre · 3-3, 3-6, 4-5, 4-8, 5-4, 5-6, 5-7, 5-62, 8-9, 10-1, 10-2
standard · 2-1, 4-7, 5-14, 5-20, 5-38, 5-51, 5-71, 7-6, 7-8, 7-10, 7-12, 7-15, 8-1, 8-20, 9-2, 9-3
Start Expanded · 4-1, 8-4
start-up · 3-1
Subrecords · 3-2, 5-1, 5-2, 5-3, 5-8, 5-12, 5-14, 5-36, 5-48, 5-57, 5-59, 5-60, 5-61, 5-62, 5-63, 5-64, 5-65, 5-66, 5-67, 5-68, 5-69, 5-70, 5-71, 5-72, 5-74, 5-75, 10-2
Supplier Approval · 5-59, 5-60, 5-67

Support Details · 3-5
System Preferences · 3-1, 4-1

T

Test · 5-57, 5-58, 5-71, 5-72, 5-73, 12-2, 12-3
Toolbars · 3-1, 3-2, 3-4, 4-1, 5-1, 5-12, 5-13, 5-17, 5-20, 5-27, 5-29, 5-30, 5-34, 5-37, 5-53, 5-59, 7-11, 8-2
Training · 3-2, 3-3, 3-4, 4-2, 4-8, 5-2, 5-3, 5-4, 5-5, 5-6, 5-7, 5-8, 5-9, 5-10, 5-12, 5-15, 5-17, 5-19, 5-20, 5-32, 5-36, 5-37, 5-38, 5-39, 5-40, 5-41, 5-43, 5-44, 5-47, 5-48, 5-49, 5-50, 5-51, 5-52, 5-59, 5-60, 5-63, 5-64, 5-65, 5-66, 5-69, 5-70, 6-3, 7-23, 8-10, 8-12, 9-4, 9-19, 10-1, 10-2, 12-2
Training Modules · 3-4, 4-2, 5-6, 5-7, 5-8, 5-10, 5-37, 5-38, 5-48, 5-49, 5-59, 5-60, 5-63, 5-64, 5-65, 5-66, 8-10

U

Unlock All · 5-3, 5-10, 5-11, 12-3
Updated Training Module · 5-3, 5-6, 5-7, 5-38
User Centre · 3-3, 3-4, 4-1, 4-2, 5-9, 5-21, 5-36, 5-37, 5-46, 5-51, 5-59, 5-60, 5-61, 5-66, 5-69, 6-3, 12-5
User Process · 3-1, 4-1, 5-49
Utilities · 5-3, 5-6, 5-8, 5-10, 5-11, 5-37, 5-38, 5-49
Utility · 5-3, 5-4, 5-5, 5-6, 5-7, 5-8, 5-9

V

View · 3-2, 3-4, 5-1, 5-2, 5-3, 5-7, 5-12, 5-13, 5-14, 5-30, 5-34, 5-37, 5-38, 5-40, 5-46, 5-49, 5-50, 5-51, 5-62, 5-64, 6-1, 6-3, 6-4, 7-20, 7-22, 7-23, 7-28, 7-30, 8-9, 8-12, 8-14, 8-20, 9-3, 9-6, 9-7, 9-8, 9-9, 9-10, 9-11, 9-12, 9-13, 9-14, 9-16, 9-17, 9-18, 9-19, 10-1, 10-2, 10-3
View EB · 3-4
View Menu · 3-4, 6-3, 7-22, 7-28
View Toolbars · 3-4
View Type · 5-1, 6-4

W

Word · 3-6, 8-1, 8-2, 8-3, 8-4